# MANAGING THE IMPLEMENTATION OF EDUCATION POLICIES FOR QUALITY EDUCATION IN PUBLIC SCHOOLS OF LIMPOPO PROVINCE

by

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**DECLARATION**

I, NDOU NNDWAMATO, hereby declare that "Managing the implementation of education policies for quality education in public schools of Limpopo province" is my own work and that all the sources that I have used or quoted have been indicated and acknowledged by complete references.

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Signature

NDOU NNDWAMATO

21 OCTOBER 2015

# ACKNOWLEDGEMENTS

**DEDICATION**

This research study is dedicated to my mother Phophi Avheani Maselesele Raphulu Ndou, who brought me up under difficult socio-economic circumstances and nurtured my future to such great heights. You deserve an honorary doctorate for the parental work well done.

# ABSTRACT

South Africa is currently undergoing a process of change from a segregated education system to a more democratic system of education. The country is characterised by drastic policy shifts in the social, economic and political arenas. The problem that called for this research is that education managers at national, provincial, district, and circuit levels are facing challenges in the understanding, interpretation and implementation of education policies as they apply to support staff, educators, learners and their parents or guardians. Lack of access to and knowledge of acts, policies and procedures in educational leadership and management seem to impact negatively on the effective functioning of public schools in the provisioning of quality education in Limpopo province of South Africa.

A qualitative research methodology coupled with ontology and epistemology theories were used in a phenomenological interpretive perspective. The rationale for choosing the qualitative approach was that the subject of this research study required data on the experiences, perceptions and views of the research participants. Three research instruments of data collection were employed, namely participant observation, document analysis and interviews. Purposive sampling was chosen to select the education managers as participants who were likely to be knowledgeable about and experienced in the phenomenon under study. Focus group and individual interviews were conducted with educators, education managers, and educator union representatives.

I used content analysis method to catergorise data into themes. The findings in this study revealed that knowledge of the education policies is a pre-requisite for the implementation of such policies for quality education. It was evident that education managers have inadequate understanding of the formulation, interpretation and implementation of policies. Education managers had contrasting perceptions of education quality and divergent interpretationsof education policies. The deployment of circuit managers undermined the value of management qualifications, experience and expertise in such management posts. The absence of a policy enforcement agency and a lack of coordination within different levels of education management in the province have led to unresolved cases of misconduct and non-compliance with education policies. The researcher recommends that induction of newly appointed education managers,

continuous training of the serving education managers, mentoring and monitoring of the implementation of education policies should receive priority for the provision of quality education in public schools.

**KEYWORDS**

Policy; implementation; quality; leadership; management; effectiveness; public school

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# LIST OF ABBREVIATIONS AND ACRONYMS

ANA          Annual National Assessment

CAPS        Curriculum and Assessment Policy Statement (2005)

CEO          Chief Executive Officer

CES          Committee on Education Structure

COLTS      Culture of Learning, Teaching and Service

COSATU    Congress of South African Trade Unions

CTA          Common Task of Assessment

DBE          Department of Basic Education

DoE          Department of Education

DSM          District Senior Manager

ECD          Early Childhood Development

EEA          Employment Equity Act (Act 55 of 1998)

EEA          Employment of Educators Act (Act 76 of 1998)

EFA          Education for All

EI            Education International

ELRC        Education Labour Relations Council

HIV & AIDS  Human Immune Virus and Acquired Immune Deficiency Syndrome

HoD          Head of Department

HRM          Human Resource Management

HSRC       Human Sciences Research Council

ICT          Information Communication Technology

LDoE        Limpopo Department of Education

LRA         Labour Relations Act (Act 55 of 1996)

| | |
|---|---|
| LRC | Learners' Representative Council |
| LSM | Learner Support Material |
| LTSM | Learning and Teaching Support Material |
| MEC | Member of Executive Council |
| MGSLG | Mathew Goniwe School of Leadership and Governance |
| NAPTOSA | National Professional Teachers Organization of South Africa |
| NCOP | National Council of Provinces |
| NCS | National Curriculum Statement (Curriculum 2005) |
| NDBE | National Department of Basic Education |
| NDoE | National Department of Education |
| NEPA | National Education Policy Act (Act 27 of 1996) |
| NGOs | Non-Governmental Organizations |
| NNSSF | National Norms and Standard for School Funding |
| NQF | National Qualification Framework |
| OBE | Outcome Based Education |
| OECD | Organisation for Economic Co-operation and Development |
| PED | Provincial Education Department |
| PFMA | Public Finance Management Act (Act 1 of 1999) |
| RNCF | Revised National Curriculum Framework |
| SACEA | South African Council of Educators Act  (Act 31 of 2000) |
| SACMEQ | Southern Africa Consortium for Monitoring Educational Quality |
| SADTU | South African Democratic Teachers Union |
| SASA | South African School Act |
| SDA | Skills Development Act (Act 97 0f 1998) |

| | |
|---|---|
| SGB | School Governing Body |
| SMT | School Management Team |
| SONA | State of the Nation Address |
| TAUTA | Transvaal United African Teachers' Unions |
| UNESCO | United Nations Educational, Scientific and Cultural Organization |
| UNICEF | United Nations Children's Fund (formerly United Nations International Children's Emergency Fund) |
| WSE | Whole School Evaluation |

# CHAPTER ONE:
# BACKGROUND TO THE STUDY

## 1.1   BACKGROUND TO THE STUDY

Since its inception in 1994, the post-apartheid government of South Africa has undertaken a number of initiatives to transform its education system. Amongst the changes resulting from the so-called "small miracle of 1994" (Phatlane 2006:1) there have been deliberate post-apartheid efforts to create a non-racial society. For practical reasons, these efforts could only be realised by deliberately breaking down the racial barriers that were artificially constructed by apartheid – including the desegregation and decentralisation of the schooling system through the promotion of school integration. Historically, race is inscribed in the functioning of the everyday life of schools, where the majority of learners spend a great part of their lives (Nkomo, McKinney and Chisholm 2004:4). The new era promised – among other things – to transform South African policies to ensure that all South African children would have access to a school of their choice and that no child would be turned away from a school on the grounds of race, ethnicity, class and /or religion, or even the financial position of parents. However, it is evident that even in the new dispensation many inequalities still persist (Nkomo, McKinney and Chisholm 2004:1)

The government has initiated several strategies to integrate the fragmented education department into one education system that can deliver quality education to all South African citizens. Xaba (1999:1) cites the enactment of the South African Schools Act No. 84 of 1996; the introduction of Curriculum 2005; the devolution of the administrative power from the national to the provincial departments, and the launching of COLTS (Culture of Learning, Teaching and Service) as examples of the government's effort to improve education. All documents that are aimed at improving the quality of education are based on the Constitution of the Republic of South Africa (Act 108 of 1996). A high standard and quality of education is a right for every citizen of South Africa. The right to education is an empowering right necessary for the fulfilment of other economic, social, cultural, civil and political rights (UNICEF 2007:7). The successful implementation of the new curriculum and other education legislation requires huge support and resources (material, human and financial) from the entire South African public (Rembe 2005:14). A major emphasis in the immediate post-apartheid period was on

redistributing resources at inter-provincial level through policy and legislation based on equity and redress criteria (Mothala 2008:23).

Changes in government departments are possible through the development of new policies and amendments of existing policies. Geyser (in Mda and Mothata 2000:22) comments that after 1994 new education systems, laws and policies have transformed the education system in the country significantly. This transformation in education has led to a paradigm shift from a teacher and content-driven curriculum to an outcomes-based and learner-centred curriculum. The new curriculum is aimed at developing citizens that are multi-skilled, knowledgeable and sensitive to environmental issues and are able to respond to the many challenges that confront South Africa in the twenty-first century. The principles underpinning the national curriculum are crucial and promote the values embodied in the Constitution of the Republic of South Africa (Act No. 108 of 1996), namely social justice, a healthy environment, human rights and inclusivity (DoE 2003b:5). Ndlovu, Bertram, Mthiyane and Avery (1999:4) state that these policies will require active stakeholder participation and suggest increased management and leadership responsibilities at schools.

South African education is undergoing a process of change from a segregated to a more democratic education system. According to Tshubwana (2006:3), the new system of education in South Africa emphasises equal access and improvement of the quality of education. To successfully put into practice the new education policy, management in education institutions has to change. New policies and new legislation have redefined the concept of leadership, management and governance in schools. The new educational context in South Africa emphasises transparency, responsibility, democracy and accountability. The new education policy requires school leaders and managers to work in democratic and participatory ways to build relationships and ensure efficient and effective delivery, but many school leaders and managers are struggling to translate policy into practice (Tshubwana 2006:4).

South Africa is characterised by drastic policy shifts in the social, economic and political arenas. These policy shifts are also directed towards educational reform. Under Bantu Education (a system of education meant for the black children during the apartheid era), many children went to school but received inferior education. Zegeye and Maxted (2002:1) point out that colonial

and apartheid policies have left the majority of the South Africans living in a highly unequal society in which poverty and social dislocation have had profound and traumatic effects on the social fabric of society. Black schools did not receive the resources needed and this created apathy and despondency (Tshubwana 2006:3). All laws before 1994 that were perceived as contentious or undesirable were repealed and new legislation was put in place. New ideological and political credentials of the new government were established. During this period, many successes were recorded. These reflected in many policy papers, legislation, regulations and norms and standards. The ideological and political credentials were also embedded in the mission statement of the Department of Education, which states "Our vision is of a South Africa in which all its people have equal access to lifelong education and training opportunities, which will contribute towards improving the quality of life and buildinga peaceful, prosperous and democratic society" (DoE 1996c:9).

The South African Schools Act (Act 84 of 1996) is the first step towards educational change. Transformation, and in particular the policy process, is beset by continuous debate, contestation and struggle for the success of ideas and interests that are pursued by individual actors, groups and policy networks through institutions. During these different stages, policies have been modified, constituted and reconstituted. As a result, they have given rise to intended and unintended outcomes that are likely to support or contradict the objectives of those policies. Transformation in the education system in South Africa is prescribed by state regulations and cannot be waived at random by schools. There are statutes and prescripts that are passed by the parliament and provinces, and school managers are expected to perform their professional management tasks according to these guidelines irrespective of the location of their schools.

The level of policy implementation towards the provision of quality education needs improvement. According to Rembe (2005:1), despite the development of new democratic education policy, there are still challenges in the implementation of such policies at provincial, district, circuit and school levels. Factors such as lack of understanding of the education policies, complex management and leadership structures that are in place, and the lack of adequate human, physical and financial resources from the state make it difficult to effect changes in the equal provisioning of quality education to all people of South Africa. Policies are difficult to

implement because those who are supposed to implement them do not understand them. Such people are usually involved at the tail end of the process of policymaking. Sayed, Subrahmanian, Soudien, Carrim, Balgapalan, Nekhwevha and Samuel (2007:116) identify what they refer to as "policy zeal" as the key aspect of the South African education policy environment. The environment of change is mediated by social structures and relations, diversity, race, class, power asymmetries and hierarchies, ideology and voice as well as by the positions of those who make, shape and implement policy (Sayed *et al* 2007:116).

Much has been done on the agenda to effect changes in the education system. According to Rembe (2005:1), the post-apartheid government of South Africa has committed itself to achieving fundamental transformation of the education system. The government has adopted policies and measures that aim to bring about the goals of equity and redress, to enhance democracy and participation of all groups in development and decision-making processes at all levels. It is acknowledged that the democratic government has accomplished a great deal in education within this short period and has made numerous strides in enhancing equity, redress and social justice; providing high quality education for all the people of South Africa; bringing about democratisation and development; and enhancing effectiveness and efficiency. However, the achievement of the desired goals seems not to be in line with the expected outcomes as set out in the Constitution of the Republic of South Africa (Act 108 of1996) and relevant applicable education legislation.

In its attempt to improve quality education provision to all schools, the government of South Africa has developed a strategic plan characterised by the following activities: change policies and laws for all levels of education; develop "inclusive schools" and other centres of learning so that all learners, including out-of-school learners, can have equal opportunities to be educated; strengthen education support services, especially at the district level and in schools; conduct national information campaigns to help ordinary schools and other centres of learning to understand inclusive education; develop a new curriculum for schools and new way of assessing learners; develop and improve schools and other centres of learning; develop new ways to ensure that good quality education is provided in all schools and centres for learning; train and develop the skills of teachers in both the "ordinary" and the "special" schools; develop programmes to

identify and address learning problems and disabilities early in the foundation phase of schooling; address the challenge of HIV/Aids and other infectious diseases; and find ways to ensure that there is enough money to pay for all of these activities. It can be deduced from the effort of the Department of Education that much needs to be done to achieve access to quality education in South Africa.

The implementation of policies that were formulated with the intention of redressing past injustices seem to be a challenge in Limpopo Province. For example, the policy mechanism for achieving equity in schools is the National Norms and Standards for School Funding (NNSSF) (DoE1998d), paragraphs 110 and 112 of the South African Schools Act (Act 84 of 1996). The logic of this proposal is that schools and their communities are classified based on their needs and then allocated a proportional percentage of funds from non-personnel expenditures. Sixty percent of available recurrent non-personnel resources go to 40 percent of the poorest schools in an education department. The teacher rationalisation policy was an attempt to reduce overspending on educators' salaries but the implementation of the latter was not a smooth process, with an initial sharp increase in teachers' numbers and a consequent rise in spending. Resolution 2 of 2008, in line with Education Labour Relations, was signed with the aim of fast-tracking the process of addressing the teacher-learner ratio, which aims at addressing the oversupply and shortage of educators in schools within the province (RSA 2001 and 2005:7). The implementation of the Public Finance Management Act (Act 1 of 1999) and prescripts for the management of school funds for 2011 in Limpopo Province as amended seems to be a serious challenge for the principals in terms of non-adherence to such regulations.

Zungu (2014) conducted an investigation on the topic "The implementation of Inclusive Education policy in primary schools:opportunities and challenges in Wakkerstroom Circuit, Mpumalanga" and identified factors that influence effective implementation of Inclusive Education policy (White Paper) as professional support; resource utilisation; human, material and physical support; and the role of stakeholders' and teachers' attitudes towards inclusion. It was evident that the implementation of inclusion policy is still a challenge because of one or a combination of the factors stated in Zungu's findings. The findings of Ndoziya's (2014) study, "The instructional leadership roles of the secondary school principal towards quality school

improvement in Zimbabean schools", revealed that the principal as the leader of the school as an educational institution has a vital role in acting as a vehicle for the delivery of quality education at schools. The context of Zimbabwe as a neighbouring country was brought into this study with the aim of assessing whether the factors in policy implementation in foreign countries may be similar or different when implemented in South Africa. Although several studies have been conducted around the implementation of specific policies, I realised that a gap still exists regarding the challenges facing policy implementers in the South African context.

I therefore conducted an investigation into the level of understanding of education polices by the education managers, and their roles in leadership and management of their institutions, province, district and schools. This included an analysis of the major focus areas of the selected education legislation, a review of the existing literature, and the collection of qualitative data through interviews, participant observation and document analysis. The purpose of this research study was to improve leadership, management and administrative practices of the state's education system for the provision of quality education to all its citizens. The purpose of this research fulfils one of the three purposes of policy research, namely the social administration project; the policy analysis project; and the social project. I chose policy analysis because an evaluation of the implementation of education policies has to be conducted to investigate the challenges facing education managers on the implementation of policies in public schools. Policy analysts see policy as the function and preserve of government. The emphasis is to find out what government does, why they do it and what difference it makes (Rembe 2005:98). Hence, policy analysts seek to meet clients' needs, define and clarify their problem, identify options and assess their effectiveness, the likely obstacles to their implementation, and their fitness to purpose.

Subsequently, educational control and administration in the pre-democratic era was a curious mixture of varying degrees of decentralisation and centralisation (Claasen 1995:470, Mashau and Phendla 2011). In apartheid South Africa, the self-governing territories were located according to ethnicity. To counter the fragmentation, the application of the provisions of the South African Schools Act (Act 84 of 1996) is vital for the effective management of schools, and thus serves as a pivotal arm of the provision of quality education. These provisions include Compulsory attendance (Section 3 and 4); Admission requirements (Section 5); Language policy (Section 6);

Freedom of conscience (Section 7); Code of conduct (Section 8); Suspension and expulsion (Section 9); Prohibition of corporal punishment (Section 10); Prohibition of initiation practice (Section 10A); and Representative Council of Learners (Section 11). To complement the above, the South African Schools Act (Act 84 of 1996 (SASA); Employment of Educators Act (Act 76 of 1998); and the South African Council of Educators Act education and general parliamentary legislation provide the other pillars to support the South African education system.

The need for enhancing the development process in the developing nation is becoming ever more critical and urgent. The pace at which this can be realised is hinged essentially on the ability of the government to formulate appropriate policies and, very importantly, on the capability of the public bureaucracy to effectively implement the formulated policies. Similarly, it can relate to policy, which involves a series of activities undertaken by government and its institutions to achieve the goals and objectives articulated in policy statements. Policy implementation sits within the 'policy cycle', which involves policy design followed by policy delivery and then policy review. In practice, however, the lines between these stages in the policy cycle can become quite blurred.

In this study, provincial, district, circuit and school management systems were evaluated with the aim of identifying challenges facing education managers in the implementation of education policies for the provision of quality education. The "top-down" interventions in policy implementation considered in detail. The study focused at the transformation of the South African education system from the apartheid era to the current education system since 1994 after the first democratic election. Selected education policies during the former Bantu education system and the current transformational education policies were analysed. Historical background of the South African government prior to 1994 will serve as the basis of our discussion in this thesis.

## 1.2 CONCEPTUAL FRAMEWORK

### 1.2.1 Policy

The term policy is central to the operation and activities of both private organisations and public institutions. A policy option made by an individual or private institution is known as private policy, while one made by government or its institutions is called public policy (Ozor 2004). There is no single definition of policy. Different authors view policies differently and define them in context. According to Rundell, Fox and Hoey (2002:109), policy is the course of action or set of plans adopted or agreed on by a government, business and individuals. Various public policy authors have formulated definitions that embrace different aspects of public policy (De Conning 2004:11). Easton (in De Conning 2004:11) defines public policy as the authoritative allocation through political process of values to groups or individuals in society. On the other hand, (Kani 2002:10) defines school policy as "an official action taken by the school for the purpose of encouraging or requiring consistency and regularity". Policies are the product of consultation and debate and should not be the work of an individual (Rembe 2005). In this study, policy refers to acts and legislation formulated at national, provincial and school levels which must be implemented to meet the goals and objectives of the education system in South Africa.

### 1.2.2 Implementation

Swanepoel, Erasmus and Schenk (2008:144) define implementation as execution of strategy that entails creating the necessary architectural configuration, including structures, systems, processes and policies. According to Fox (2007:27), implementation refers to the tools and techniques that are used for improvement of quality. Implementation is the realisation of an application, or execution of a plan, idea, model, design, specification, standard, algorithm or policy. According to Brynard (2005:9), the most common meaning of implementation is "to carry out, to accomplish, to fulfil, to produce or to complete". In this study, implementation means making use of and putting into practice policies, rules and procedures as set out in South African education legislation by the leaders and managers in public schools of the Limpopo Province of South Africa.

### 1.2.3   Quality

Quality is a difficult term to define, mainly because its meaning is normally related to the specific characteristics of the phenomenon that it seeks to describe. Teu (2002:12) admits that quality is easily defined informally but as soon as one tries to define it formally, vigorous and emotional debates ensue. De Jager and Nieuwenhuis (2005) propose that quality is a dynamic state associated with products, services, people, processes and the environment that meets or exceeds customer expectations. In this study, quality means the provision of education that meets the goals and objectives of the country South Africa in general and satisfies the expectations of communities, Limpopo Province in particular.

### 1.2.4   Leadership

Leadership is defined by numerous authors with different views and approaches and in such definitions common aspects may be identified. Leadership is the ability and the potential to influence any group towards the achievement of identified goals (Department of Education, 2004b). According to the Oxford Dictionary (2008), a general definition of leadership is "to provide guidance by going in front". According to Van Deventer and Kruger (2008:139), leadership is generally defined as one or other form of dominance where the subordinates more or less have to accept the commanding and controlling of another person. Another definition of leadership is "a social influence process that involves determining a group's objectives, motivating behaviour in aid of these objectives and influencing group maintenance and culture" (Smith 2007:116). The process of leadership includes the use of non-coercive influence to direct and co-ordinate activities of the members of an organised group toward the accomplishment of the organisation's goals (O'Shea, Foti, Hauenstein and Bycio 2009:237). In this study, leadership means the activities of people authorised by the Department of Education in their responsibilities to influence their sub-ordinates to implement the policies as set by national and provincial legislature for the provisioning of quality education.

### 1.2.5 Management

Khuzwayo (2007:8) regards management as concerned with ensuring the optimum use of resources, determining the direction and adaptability of an organisation in changing environments and relating aims and impact to society. Bush and Heystek (2003:45) state that management is a set of activities directed towards efficient and effective utilisation of organisational resources in order to achieve organisational goals. In this study, management can be construed to mean a social process whereby human resources and organisational processes are co-ordinated to achieve the desired goals of the public institution.

### 1.2.6 Education manager

According to Ngwenya (2006:10), the term education manager refers to the executive who is officially appointed by the Public Service Commission among professionally trained teachers according to the ministry's promotion procedures. The incumbent has delegated authority, and is usually accountable to the governing body of the institution. Such a person is responsible for planning, directing, controlling and coordinating the activities of teachers and other stakeholders in an institution. In some cases, such an office bearer is referred to as the principal, school head or administrator (Ngwenya 2006:10) further defines education managers as members of the School Management Team (SMT) and include the principal, the deputy principal and education specialists. The title 'Education Specialist' has subsequently (with effect from July 2008) been changed to 'Department Head' by the Department of Education. The school principal is in charge of the SMT and is thus the most important education manager of the school. In this study, education manager refers to all provincial, district, circuit and school managers responsible for the implementation of education policies as heads or administrators in their respective institutions.

### 1.2.7 Effectiveness

The Oxford South African School Dictionary (2008) defines effectiveness as a method that works well or a way that gets the results you wanted or working well without mistakes or wasting energy. According to Swanepoel, Erasmus and Johnson (2008:6), effectiveness occurs

when the right service has been rendered. Etzon (1994 cited in Chakanyuka 2004:7) defines effectiveness as the extent to which an organisation achieves the objectives for which it was established. Fundamentally and according to Hornby (2010), the word effective refers to producing the results that are wanted, or intended, or producing a successful result. In the context of this study, effective policy implementation therefore entails implementing a policy in such a way as to produce, attain or realise the goals and objectives of the policy. In essence, if a policy is effectively implemented, the designed and planned development goals and objectives are realised. The basic end or focus of the bureaucratic activities should then be on how best to effectively implement policies. In this study, effectiveness means excellence in leadership and management of quality education at all public schools in the Limpopo Province.

### 1.2.8   Public schools

Mothata (2000:133) defines the term 'public school' as a school maintained largely through funds made available by the Member of Executive Council (MEC) of Education in a province, in terms of section 2 of the SASA (RSA 1996c) for the purpose of public schools. Van der Westhuizen (1996:113) defines a public school as an organisation that meets all the universal, general requirements of an organisation. In terms of the South African Schools Act (RSA 1996c:4), "school" means a public school or an independent school that enrols learners in one or more grades between grade zero and grade twelve. According to the Employment of Educators Act (Act 76 of 1998), the concept "school" refers to an educational institution or such an institution at which education as well as training, including pre-primary education, is catered for and which is sustained, managed and controlled or subsidised by a provincial department. In this study, public school denotes an educational institution where learners from grade R to grade 12 receive formal teaching and learning. To be more specific to the context, the concept refers to all primary and secondary schools that are under the control of the Department of Education in Limpopo Province in South Africa.

### 1.2.9   Limpopo Province

The Limpopo Province is one of the nine (9) new provinces of South Africa that replaced the previous division of four provinces and ten homelands after the first democratic

elections (Mabasa 2002:12). It is the fifth largest province in South Africa with a population of about 5.5 million, of which 96 percent are blacks. Limpopo Province is predominantly rural (90%), and the poorest of the nine provinces in South Africa. Rampedi (2003:7) indicates that the Limpopo Province is a product of three homelands merged together – the former Lebowa, Gazankulu and Venda. The three dominant languages spoken in the Province are Northern Sotho (56%), Xitsonga (23%) and Tshivenda (12%). These are followed by Afrikaans and English. In a survey conducted in 2006, it was estimated that about 48 percent of the people living in the Limpopo Province are illiterate and have had little or no education (Labour Force Survey, March 2006). In this study, Limpopo Province means one of the nine provinces in South Africa consisting of five education districts that are responsible for the management and administration of basic educationin public schools.

## 1.3   PROBLEM STATEMENT

Polit and Beck (2004:730) describe a problem statement as an expression of the dilemma or disturbing situation that needs investigation for the purposes of providing understanding and direction. It identifies the nature of the problem that is being addressed in the study and typically its context and significance. In this study, I observed leadership and management of the public schools and identified the areas of concern. These were translated into the research problem and research questions as described below:

### 1.3.1   Main problem

The problem that called for this research is that education managers at national, provincial, district, and circuit levels are facing challenges in understanding, interpreting and implementing education policies as they apply to support staff, educators, learners and their parents or guardians. The education policy requires school leaders and managers to work in democratic and participatory ways to build relationships and ensure efficient and effective delivery, but many school leaders and managers are struggling to translate policy into practice (Tshubwana 2006:4). With the rising number of high-profile cases of senior management failure and leadership misconduct, there has been an increasing awareness that one of the core challenges of

management is to lead responsibly and with integrity (Maak and Pless 2006). White and Lean (2008) found that perceived leader integrity has a definite impact on the ethical behaviour of followers, and it can therefore be relevant to the relationship between senior and middle managers. It follows that effective managers can lead effective schools that can provide quality education to their learners. The aims and objectives of each education policy developed after 1994 democratic elections were to transform the decentralised education system into a centralised education system that can provide quality education to all South African citizens. Therefore, the inability or failure to implement education policies may lower the standard of education as envisaged in the constitution of the Republic of South Africa.

**1.3.2**  First sub-problem

Cases of non-compliance by principals, educators, circuit managers, and district senior managers reported at provincial level suggest that there are challenges in the implementation of the education policies.

**1.3.3   Second sub-problem**

Lack of implementation of education policies hampers the provision of a quality educational management system that can yield good results and eradicate numerous charges laid against education managers at various levels within the department.

## 1.4   RESEARCH QUESTIONS

I translated the problem statement into research questions. According to Creswell (2008:122), research questions help to narrow the purpose statement to specific questions that the researcher seeks to answer. In view of the stipulated purpose statement in which the problem is embedded, a number of research questions have been formulated as indicated below:

**1.4.1   Main research question:**

How do education managers in Limpopo Province interpret and implement the selected education policies for the provisioning of quality education in public schools?

**1.4.2    Research sub-questions:**

*1.4.2.1 What knowledge or interpretations of educational policies do school leaders and managers have?*

*1.4.2.2 Why do school managers have such interpretations of these education policies?*

*1.4.2.3 What view of leadership and management role is held by education managers about the implementation of education policies?*

*1.4.2.4 What roles should the provincial, district, circuit and school managers play in the implementation of education policies in public schools?*

## 1.5    AIMS OF THE STUDY

The aim of this study is to find out how education managers in Limpopo Province interpret and implement education policies in leadership and management towards the provision of quality education in public schools of Limpopo Province. This aim has been formulated in accordance with the input of Polit and Beck, who define the aim of the study as a statement of purpose, which is usually captured in one or two clear sentences that describe the essence of the study and establish the general direction of the inquiry (Polit and Beck 2004:74).

## 1.6    SIGNIFICANCE OF THE STUDY

The purpose of a study should be clear and compelling to the readers. According to Burns and Grove (2003:156), objectives are clear, concise, declarative statements expressed in the present tense and for clarity, with only one or two variables. Marshall and Rossman (2011:68) add that justification of the study requires that it should contribute meaningfully to the body of scientific knowledge. The current study is important, as its interpretations and recommendations will contribute to the body of knowledge on policy implementation that will be of help to other researchers and the Department of Education on the implementation of education policies for the provisioning of quality education in public schools. The research will also open doors for further research on sub-topics that derived from the findings of the study and increase research attention on policy implementation challenges. In addition, the study will guide general principles on the

effective implementation of education policies. Furthermore, education managers will consider areas of improvement on the provision of quality education embedded on the constitution. Finally, the study will add value to the existing knowledge of education policies so that policy makers may consider improving on some weaknesses identified in the study for further planning and enhancement of learning at public schools.

## 1.7    THESIS STATEMENT

Good understanding and implementation of education policies may impact positively on the effectiveness of leadership and management in the provision of quality education in public schools.

## 1.8    RESEARCH PARADIGM

According to Tavalker and Mansor (2010), a theoretical framework is the lens through which a study is approached. It introduces and describes the theory that explains why the research problem exists. It gives a researcher focus and clarity regarding the research questions to ask, the literature to consult and the methods to employ. It determines the variables to be measured, and the statistical relationships between those variables. A paradigm is a set of beliefs or epistemological assumptions the researcher uses to make sense of research information and transforming it into data implicitly or explicitly (Briggs, Coleman and Morrison (2012:16). Somekh and Lewin (2005:347) describe a paradigm as an approach to research which provides a unifying framework of understandings of knowledge, truth, values and the nature of being.

I adopted a qualitative research paradigm based on  a phenomenological and ontological approaches. I collected data through observation and interviews where the participants gave meaning to their lives, and reasons for their behaviour and attitude towards education policy implementation, which were accepted as legitimate causes of behaviour. According to Marsh and Furlong (2002:18), ontology is the science or theory of being. It concerns the question of how the world is built: "is there a 'real' world 'out there' that is independent of our knowledge of it?" Hay (2002:61) asserts that in ontology, when put into the political context, the question might be "What is the nature of the social and political context we might acquire knowledge about?"

The reason for attention to ontology is that the research study focused on the formulation, interpretation and implementation of education policies on the provisioning of quality education in public schools in Limpopo Province and the aims of the study may be achieved through a politically based approach (Marsh and Furlong (2002:17).

I worked from an interpretivist research view, which posits that knowledge is constructed not only by observable phenomena, but also by people's subjective beliefs, values, reasons and understandings (Henning, Van Rensburg and Smit 2004; Creswell, 2007). According to Morrison (2002:18), for interpretivists "reality is not out there" as an amalgam of external phenomena waiting to be uncovered as "facts", but a construct in which people understand reality in their lives. Henning, Van Rensburg and Smit (2004:21) contend that the foundational assumption of interpretivists is that most of our knowledge is gained, or at least filtered, through social constructions such as language, consciousness, shared meanings, documents and other artefacts. According to Nieuwenhuis (2007:60), the ultimate aim of interpretivist research is to provide insights into the way in which a particular group of people make sense of their situation or phenomena that they encounter. I therefore interacted with the education managers at different education management levels to gain understanding of how they experience the implementation of education policies for the provision of quality education in public schools.

## 1.9   RESEARCH METHODOLOGY

I used an interpretive explanatory qualitative research design. The research design suggests the methodology that will be employed in a research study. According to Kumar (2011:94), a research design is the procedural plan and structure that is adopted by the researcher to obtain evidence to answer the research questions' validity objectively, accurately and economically. Denzin and Lincoln (2011:14) assert that the research design describes a flexible set of guidelines that connect theoretical paradigms, first, to strategies of inquiry and second, to methods of collecting empirical material (Terre Blanche and Durrheim 2002:29).

Such research approach also seeks to address "questions that stress how social experience is created and given meaning" (Denzin and Lincoln 2011:8). There are many qualitative research designs, including grounded theory, phenomenology, case study, ethnography and narrative

analysis (Lichtman 2010:87). In this study, I used both interactive and non-interactive modes of enquiry through observations, interviews and document analysis. The study also adopted an institutional approach to explain the effect or consequences of institutional rules or structures, arrangements and procedures on the adoption and content of policies in the education sector in South Africa, including the outcome of their implementation.

### 1.9.1   Selection of participants

I used purposeful sampling to select the most relevant participants. According to Brewerton and Millward (2012:117), individuals are selected from a population according to underlying interests in particular groups. They further assert that this form of sampling may not be representative, but will probably yield useful information all the same. The size and content of any research sample will affect the type, level and generalisability of analysis that can be undertaken (Brewerton and Millward 2012:117)

The researcher is guided by the title of the research. Individuals or a group of people is selected based on their expertise, knowledge and experience in a particular institution. The key concepts of the research topic direct the development of the interview schedules as well as the choice of people who can contribute to the research study. The process of selecting the participants for research is known as sampling. According to Burke and Larry (2011:216-217), a sample is a set of elements taken from a larger population. Gay and Airasian (2003:102) define the population as the group of interest to the researcher, the group to which the results of the study will ideally be generalised. Ollenburger (2001:3) explains that population does not necessarily mean a body of people and indicates that the term population refers to all cases about which a researcher wishes to make inferences. The researcher, according to Ollenburger (2001:77), has to study small subsets of the population, called "samples".

Sampling cannot be done haphazardly, but follows a specific sequence of steps. According to David and Sutton (2011:227), one of the key requirements of sampling is that the selected sample is not biased by either over- or under-representing different sections of the population. In purposive or theoretical sampling, the units are selected according to the

researchers' own knowledge and opinion about which ones they think will be appropriate to the topic area. I used purposive sampling as I chose participants with knowledge of the subject under investigation and those who were directly involved in the implementation of the education policies in South Africa.

Participants were drawn through purposive sampling as follows, three Labour Relations Officers, three Curriculum Managers, three District Finance Managers, three Human Resource Managers, six Circuit Managers, and three Governance Managers. Twenty-one (21) individual in-depth interviews were conducted at different venues and times. Three focus-group interviews were conducted with a group of four Educator Union representatives, ten (10) school managers and ten (10) educators in public schools. The participants were selected because of specific attributes within their occupational positions. They were likely to be knowledgeable and informative about the phenomenon I wished to investigate. The sample was likely to answer the research questions for this study.

### 1.9.2   Instrumentation and data collection techniques

The study adopted interpretive qualitative research methodology, where different kinds of data collection methods were used to collect information, namely analysis of documents, individual structured interviews, interviews, and observations.

I used triangulation to establish reliability and validity of data as a means of ensuring the trustworthiness of the research. According to Scott (2007:84), triangulation means comparing many sources of evidence in order to determine the accuracy of information or phenomena. It is essentially a means of crosschecking data to establish its validity. The principle of triangulation rests on the assumption that particular events are being investigated and that, if they can be investigated in a number of different ways that concur, then the researcher may believe that their account is a true account of those events. In this study, I adopted a data triangulation approach, where different data sets were collected at different times through participant observation, document analysis and structured individual and focus group interviews.

*1.9.2.1 Analysis of documents*

The term document may mean different things, depending on the context in which it was used. The term document refers to a wide range of written, physical and visual material, including what other authors may term artefacts (Ary, Jacobs and Razavieh 2006:282). Documents such as books, theses, articles, newspapers, etc. were used as part of the literature review.

In this study, the analysis of the policies was based on the preamble, aims and objectives of the policy, major areas addressed by the policy, and the expected output of each policy towards the provision of quality education in all public schools in Limpopo Province. In addition to analysis of education policies, documents as listed by Briggs, Coleman and Morrison (2012: 299-300) were analysed at provincial, district, circuit and school levels.

*1.9.2.2 Observations*

Observation is the most powerful, flexible and real data collection strategy because it is not dependent, like the survey, on the respondents' personal views but seeks explicit evidence through the eyes of the observer directly or through a camera lens (Briggs and Coleman 2007:237). According to Marshall and Rossman (2011:139), observation captures a variety of activities that range from spending time in the setting, getting to know people, and learning the routines to using strict time sampling to record actions and interactions and using a checklist to tick off pre-established actions. Observation entails the systematic noting and recording of events, behaviours and artefacts in the social setting. (Brewerton and Millward 2012:96).

I designed the observation sheets on which I wrote field notes when I interacted with the participants who were sampled in this study. I am a school manager and gained an understanding of South African education legislation when I interacted with my colleagues who are members of the School Governing Body and educators who are staff members as they implement policies at school.

*1.9.2.3 Interviews*

Interviews are central to the data collection instruments in qualitative research. Johnson and Christensen (2011:178) define an interview as a data collection method in which the interviewer asks questions from an interviewee. I conducted a pilot study to be sure of the reliability of the interview as data collection instrument. I sampled five participants representing different groups of the entire sample. I conducted pilot study based on the advantages articulated by Samson (2004). Samson (2004) as cited in Marshall and Rossman (2011: 95), explains the importance of pilot studies as follows: It can be used to try out strategies, buttress the argument and rationale for a genre and strategy, refine research instruments such as questionnaires and interview schedules, help in understanding oneself as a researcher. Helps the researcher find ways to eliminate barriers such as resistance to tape recorders, reduce mistrust of the resercher's agenda and strengthens the genre of generating enticing research questions.

## 1.10  DATA ANALYSIS AND INTERPRETATION

According to Denscombe (2007:303), the researcher needs to be selective in what would be presented by prioritising certain aspects over others, because in the analysis of qualitative data, it is not possible to present all the data that was collected by means of the interview. According to McMillan and Schumacher (2006:364), data processing, through data analysis, makes sense of the collected data and thereby finds an answer or answers to the research question. In qualitative studies, data consists of interwoven and integrally related processes of data recording and management, analysis and interpretation (Marshall and Rossman 2006:151). This implies that there are no firm boundaries between these processes.

McMillan and Schumacher (2006:364-365) state that data analysis is an ongoing cyclical process that is integrated into all phases of qualitative research. They  describe the steps of data analysis in qualitative research as follows: Fieldwork; recording; data coding and categorising; patterns, themes or concepts) and narrative structure or visual representations.

I therefore collected data by undertaking fieldwork, transcribed data, and categorised the data into patterns based on themes or concepts. Data was organised through coding. This aligns with

Neuman's (2003:441) assertion that "a qualitative researcher analyses data by organising it into categories on the basis of themes, concepts, or similar features".The main form of data analysis in this study was of content analysis. According to Patton (2003:463), content analysis is the process of identifying, coding, categorising, classifying, and labelling the primary patterns in the data. Brewerton and Millward (2012:151) describe the qualitative content analysis process in roughly the same way as Marshall and Rossman (2011), but with a further deeper description of coding. In this study, I used a qualitative content analysis process as advocated by Brewerton and Millward (2012) and Marshall and Rossman (2011). I analysed data collected through observation, interviews and document analysis. Document analysis included a literature review of previous researchers on the topic. Data was tape-recorded, transcribed and analysed with the intention of seeking understanding that would lead to sound conclusions and recommendations.

## 1.11 TRUSTWORTHINESS OF THE RESEARCH

Research must respond to canons that stand as criteria against which the trustworthiness of the project can be evaluated (Marshall and Rossman 1995:145-146). The findings and recommendations derived from data collected must be proved valid and reliable. In the next section I discussed two criteria met by this qualitative research study, namely reliability and validity.

### 1.11.1 Reliability

Research can be tested against its level of reliability. According to Wilkinson (2000:42) reliability refers to a matter of consistency of measure; the likelihood of the same results being obtained if the procedure is repeated. In addition, Bellis (2000:137) believes that tests, exams or others must test what was supposed to be tested and not something else. There is wide support for the view that reliability relates to the probability that repeating a research procedure or method would produce identical or similar results. It provides a degree of confidence that replicating the process would ensure consistency. According to Scott and Morisson (2006:208), these notions underpin the definition of reliability: "A measure is reliable if it provides the same results on two or more occasions, when the assumption is made that the object being measured

has not changed…. If a measure, or indeed a series of measures when repeated gives similar results, it is possible **t**o say that it has high reliability.

### 1.11.2 Validity

Data collection instruments may measure what they are expected to measure depending on the context of the research. Babbie (2001:143) explains validity as the extent to which an empirical measure adequately reflects the real meaning of concepts under consideration. According to Wilkinson (2000:42), validity broadly relates to the extent to which the measure achieves its aim, that is the extent to which an instrument measures what it aims to measure, what it claims to measure or test; what it is intended to test.

In this study, I ensured validity by visiting four education districts in Limpopo Province and interviewing selected participants in the language of their choice. Participants were recorded and transcriptions were made to avoid subjectivity in the analysis of the findings and interpretation of the results based on the data collected.

## 1.12 LIMITATIONS AND DELINEATIONS OF THE STUDY

All proposed research projects have limitations; none is perfectly designed. Patton in Marshall and Rossman (2011:76) notes: "There are no perfect research designs. There are always trade-offs." Limitations derive from the conceptual framework and the study's design. In this study, I identified limitations and proposed alternative solutions to eliminate or reduce them for the success of the research project. According to Hostee (2010:87), delineations explain everything that the researcher is responsible for examining and detailing and that which the researcher is not responsible for investigating. They limit the scope of the study, leaving the conclusions not applicable in certain circumstances. Limitations affect how the researcher is able to generalise the conclusions or how confident the researcher is about the conclusions (reliability).

The study took place in Limpopo Province and covered four districts, namely Vhembe, Mopani, Capricorn and Greater Sekhukhune. The study faced constraints with regard to the following:

i. Cultural diversity and belief could have an influence on their willingness and truthfulness to give adequate correct information as part of the data. Therefore, I clearly stated the purpose of the research to the participants in their letters of consent.

ii. The literacy level of the respondents may negatively affect the appropriate response to the interview schedules. Therefore, I used short questions or instructions with simple terminology and, where the need arose, gave explanations to the participants in their mother tongue.

The busy schedules of the participants could delay the data collection process. Therefore, I designed short interview schedules that were not time consuming and participants were given space to choose the most suitable time for interview sessions. The research sample included senior government officials and politicians who were not available for face-to-facemeetings with me for security reasons. I therefore used telephonic conversation to collect data from members of parliament. The use of audio cassettes was of vital importance as note taking may also be time-consuming. The expected cost of research was high as the sample was distributed throughout the entire Limpopo Province. I therefore applied for and received a study bursary to cater for data collection activities for the entire research study.

## 1.13  CHAPTER DIVISION OF THE THESIS

The thesis consists of six chapters, namely:

### 1.13.1  Chapter One: Background to the study

This introductory chapter focuses on background information about the topic, including a statement of the problem, research objectives, the research questions, delineations and limitations, the rationale of the study, a literature review, methodology, sampling, data collection methods and procedures, assumptions, definition of concepts, thesis overview and references.

### 1.13.2 Chapter Two: Literature review- theoretical framework

Key theories relevant to the study were discussed. I used sources relevant to the topic, which included books, government gazettes, the Constitution of the Republic of South Africa, Acts, legislation, education policies, research articles, papers, theses, newspapers, web-site documents from the Internet and CD-ROMS. Historical background of education before and after 1994 elections were discussed. Concepts such as theoretical perspectives on policies and approaches or theories of the policy formulation process, interpretation and implementation were discussed. The models of policy implementation were studied in line with the leadership and management structures as set in the Limpopo Department of Education. The definitions, dimensions and types of policies were dealt with in detail. The participation of stakeholders in policy formulation and implementation process also received attention.

### 1.13.3 Chapter Three: Research design and methodology

Chapter Three provides a discussion of the objectives of policy research, the choice of method of the study and research design, the definition of the concept of research, characteristics of qualitative approaches, the roles of the researcher, the advantages of qualitative research, data collection methods, research instruments, reliability and validity of data, sampling procedures or selection of participants, measuring instruments, sources of data, procedures for data collection and a statement of ethics. Analysis of documents, participant observation and interviews used for data collection are also discussed. The details of each data collection instrument amongst others covers aspects such as definitions, types, procedures or steps, advantages as well as disadvantages.

### 1.13.4 Chapter Four: Data presentation, analysis and discussion of results

In this chapter, data analysis techniques are discussed. The relationship amongst variables is compared against one another; appendices for results and tables were used for data analysis. I discussed problems and limitations experienced during the data collection stage. The research findings were presented, analysed and discussed. The interview results for each respondent or participant are tabled. Some participants answered the questions in their mother tongue, after

which I transcribed the interview results in English as the medium of the study. Data collected through document analysis and observation were presented separately. Data were coded and presented under themes. Data analysis were conducted to generate results or findings. Questions and responses from the participants appear as appendices to the last chapter of the thesis.

**1.13.5** Chapter 5: Summary, conclusions and recommendations

A summary of the main findings, conclusions as well as recommendations arising from the study were discussed.

## 1.14 CONCLUSION

Chapter 1 has introduced the background to the study, aims and objectives, research design, sampling, data collection instruments, research ethics, delineations and limitations of the study and chapter divisions. The next chapter focuses on education theories, policy development, the implementation process, leadership, management and the provision of quality education in South Africa and foreign countries. An brief overview of the historical background of education system of South Africa before and after 1994 was discussed.

# CHAPTER TWO: LITERATURE REVIEW-
# THEORETICAL FRAMEWORK OF EDUCATION POLICIES,
# LEADERSHIP AND MANAGEMENT OF QUALITY EDUCATION

## 2.1    INTRODUCTION

This chapter focuses on the theoretical framework underpinning the research project. Theories on policy-making and implementation of education policies, leadership and management are discussed from an epistemological and ontological point of view. I chose these approaches in conjuction with qualitative research methodology to collect data through observation, document analysis, and interviews, and analysed the literature on policy-making and implementation to construct knowledge through interaction with participants in the real world. The concept "theory" is defined as a key element in this chapter.

Tennis and Sulton (2008) define theory as a set of propositions used to explain a phenomenon. Theories are, in a general sense, unifying narratives about phenomena. Some such narratives can predict, while others recast our perspective or view on the world. Yet others are created to shift our views on social action fundamentally. The kind of narrative depends on the epistemic stance. Bates (2005) is of the view that theory is the entire body of generalizations and principles developed for a field. Therefore, a theory is a system of assumptions, principles and relationships suggested to explain a specified set of phenomena; however, the core meaning of theory centres on the idea of a developed understanding, an explanation, for some phenomenon. From a critical theory perspective, *theory* can be regarded as an *instrument* or a *weapon* which is used to *attack* certain targets of domination or discrimination. *Theories* can also be seen as optics, ways of seeing, and perspectives that illuminate specific phenomena (Rabaka 2009). The literature review on the theoretical framework provided the basis for an analysis of policies post 1994 aiming at the establishment of an education system that will provide quality education to all South African citizens. The review also assisted in the formulation of the objectives of the policy research, definitions of the conceptual framework, functions of education policies, methodology in policy analysis, and policy implementation processes. Furthermore, the exposition of leadership and management concepts, change management and the characteristics of quality education were provided. The literature review on education policy, leadership and management

provided me with an in-depth understanding of the subject under study and the scope for the analysis of the current education policies in South Africa. The knowledge I acquired from the literature review gave insight into the dimensions and complexity of the problem (White 2003).

According to Newby (2010:211), a literature study is the means by which researchers tie their research intentions and outcomes to what other people working in the field have done. It is also the process of assembling literature pertinent to a topic or to an inquiry. In a contextual view, Creswell (2008:116) explains that a literature review is a written summary of articles, books, and other documents that describes the past and current state of knowledge about a topic, organises a literature into topics, and documents a need for a proposed study. It is against this background that I visited libraries to study books and download theses and articles relevant to my area of study. The main purpose of the literature review was to establish the relationships that exist amongst policy research studies conducted by other authors that served as the point of departure for the phenomenon under investigation. According to Neuman (2011:123), the review of relevant literature is important because it helps to identify what is already known about the topic in order to avoid duplication. I therefore studied dissertations and thesis of Rembe (2005); Ndoziya (2014); Tshubwana (2006); Baruth 2013; Mabasa (2002); Mahlangu (2008); Mamabolo (2002) and Mbalati (2010) which are related to the phenomenon under investigation. The literature review enabled the researcher to identify various gaps in previously researched topics. It gives the theoretical base for the work already investigated in the past (Neuman 2010:91); hence I summarised the literature on policy development, implementation and analysis from a conceptual and practical perspective.

The main purpose of the literature review was to make an entry into this study's subject of concern against insights gained from other similar studies and observations. Literature review places the research problem within the context of other studies on the same subject. Tuckman (1972) in (Gora 2014:26) notes that literature review deals with, "... the study of literature related to one's topic of research". This means that one focuses interest on works that have a link with one's research topic. Literature review therefore saves time and avoids unnecessary duplication.

I approached the literature from three epistemic stances, namely positivism, interpretivism and constructivism. The combination of these three perspectives made it possible for me to acquire

knowledge from the real world, and establish laws based on findings and interaction with participants in real life situations. It grounded my interpretation of reality based on the cultural and historical background of foreign countries and South Africa in particular. I had to identify (Kumar 2011). In the review I therefore analysed the existing theories on education policies, leadership and management, compared them, identified similarities and differences, and related the findings to the existing policies and current education system of South Africa.

## 2.2   OBJECTIVES OF THE POLICY RESEARCH

Research on policy implementation has been an intensive debate among social scientists since 1970 when Pressman and Wildavsky (1973) brought the issue of policy implementation to the fore. The main aim of the research at that time was to find out a concrete theory of policy implementation. In the light of the given background, students of political science and public administration have several reasons to study public policy. The first is theoretical: Political scientists seek to understand and explain the world of policies – that is, they attempt to develop and test explanatory generalisations about the political behaviour of individuals and institutions (Clarke 2009:2). The second reason for studying public policy is practical. Political students of policy apply knowledge to solve practical problems. A third reason for studying public policy, related to the second, is political.

A policy study is vital for the development of departmental policies. According to Zondi (2009:15), policy and policymaking are probably some of the most important generic components of the administrative process. It can be deduced that policy analysis plays a major role in the public service, because it provides an insight and knowledge of society. It also contributes significantly to the exploration of environmental factors that may affect policies negatively or positively and attempts to provide answers as to what the results would be. Mostly, government relies on policy-analysis to get an idea on how to achieve policy objectives (Zondi 2009:30).

The South African government also relies on policy analysis for its improvement of a quality education system, as new policies have been developed after the 1994 democratic elections with the aim of improving the provision of quality education for all South African citizens. This is

supported by Hopkins (2007:174), who mentions policy drivers that relate to teaching and learning, namely teaching quality, personalised learning, school leadership and ethos, standards and accountability as well as networking and collaboration. My prediction was that knowledge on theory of education policies would improve the level of understanding, interpretation and implementation of education policies in public schools. In consequence, the perspective of managers on the provision of quality education might be sharpened for the better.

## 2.3  LIMPOPO PROVINCE BEFORE AND AFTER 1994

Public education is generally regulated by legislations, regulations and policies. The main distinctive feature of provision of public education from one country to the other lies in the particular centralisation of powers. Since the 1994 elections, the emphasis has been on the redress of the inequalities of the past. The South African government has strategised a programme of restructuring the education system on principles of equity, human rights, democracy and sustainable development. Changes have included a unified, national education system, a more democratic system of school governance, a new standards and qualifications authority, redistribution of financial and human resources, higher education reforms, and the re-orientation to outcomes-based education. Against this scenario of change, the South African education system still faces major challenges, with political instability at the forefront of education.

The DoE (1997:105) states that the premier of a province is responsible for the observance of the constitution and all other laws by the executive of the province. A member of the executive council of the province (MEC) is responsible for education and may be regarded as chief executive official for education in the province. School education in the province is therefore controlled by the provincial Department of Education acting in accordance with the policy determined by the MEC. Therefore, each province has its own provincial legislature and executive Council responsible for the provincial policies derived from national legislations.

To sum up, I would like to emphasise that although provinces have original and comprehensive powers with regard to school education in their provinces, they still have to comply with overall national education legislation and, more importantly, they are under obligation (as an organ of

the state) to uphold the constitution and its bill of rights as the supreme law of the country. (Squelch and Bray, 1997:54). Oosthuizen (1994:29) clearly indicates that the provincial legislature legislates within the framework of its legislative powers and addresses the following matters: The implementation of the right to education; matters related to free and compulsory basic education, provincial education policy, standards and norms; the position of educators in provincial schools, minimum qualifications and conditions of employment; the different categories of school and provincial education funding and the governance and ownership of provincial schools.

Following the promulgation of the Constitution of the Republic of South Africa (Act No. 108 of 1996), nine provinces were established. Those provinces were the Eastern Cape (including former Transkei); the Free State (including former Qwaqwa); Gauteng; KwaZulu Natal; Mpumalanga (including former KwaNdebele); Northern Cape; Limpopo (including former Gazankulu; Lebowa and Venda; North West (including former Bophuthatswana) and the Western Cape. The Eastern Cape, KwaZulu Natal, Mpumalanga and Limpopo are classified as predominantly rural as they have incorporated the former rural homelands. A close examination of the number of MECs who have served in the education portfolio for less than four years each indicates that the education portfolio is problematic and challenging; it needs people who remain focused in terms of eradicating all the obstacles that hamper the creation and maintenance of a culture of teaching and learning in schools. The education system of Limpopo is regarded as struggling to move out of dysfunctionality, with a tremendous infrastructural backlog. There is a huge shortage of properly-equipped primary schools in the Limpopo Province (Zuzile 2006:4). Of the nine provinces, the Limpopo Province features among the most disadvantaged and poverty stricken in the Republic of South Africa.

**Figure 2:1 Map of Limpopo Province after 1994**

Following the promulgation of the Constitution of the Republic of South Africa (Act No. 108 of 1996), nine provinces were established. Those provinces were the Eastern Cape (including former Transkei); the Free State (including former Qwaqwa); Gauteng; KwaZulu Natal; Mpumalanga (including former KwaNdebele); Northern Cape; Limpopo (including former Gazankulu; Lebowa and Venda; North West (including former Bophuthatswana) and the Western Cape. The Eastern Cape, KwaZulu Natal, Mpumalanga and Limpopo are classified as predominantly rural as they have incorporated the former rural homelands. A close examination of the number of MECs who have served in the education portfolio for less than four years each indicates that the education portfolio is problematic and challenging; it needs people who remain focused in terms of eradicating all the obstacles that hamper the creation and maintenance of a culture of teaching and learning in schools. The education system of Limpopo is regarded as struggling to move out of dysfunctionality, with a tremendous infrastructural backlog. There is a huge shortage of properly-equipped primary schools in the Limpopo Province (Zuzile 2006:4). Of the nine provinces, the Limpopo Province features among the most disadvantaged and poverty stricken in the Republic of South Africa.

## 2.4   STAKEHOLDER INVOLVEMENT IN EDUCATION

Consulting with all relevant stakeholders is vital for successful implementation. It allows those implementing the innovation to assess current needs, the fitness and feasibility of the innovation, and levels of capacity and readiness. According to Saxena (2014), a stakeholder of any school is anyone who is involved in the welfare and success of a school and its students, including administrators, teachers, staff, students, parents, community members, school board members, city councillors and state representatives. The views of Saxena were supported by Marić (2013) who defines stakeholders as any group or an individual who can affect or is affected by the achievement of the organisation objectives, constituencies in the organisation's external environment that are affected by the organisation's decisions and actions.

In terms of governance, former Deputy President Kgalema Motlanthe joined Minister of Basic Education, Mrs, Angie Motshekga, and representatives from civil society and business for the launch of the National Education Collaboration Trust (NECT) at the Presidential Guesthouse in Pretoria on Tuesday, 16 July 2013.

### 2.4.1 The role of educators as stakeholders in education

An educator is any person who teaches, educates and trains other persons, in this case, learners. (Department of Education 1996a). Furthermore, an educator renders an education service that is based in an education department (National Education Policy Act, Act 27 of 1996). An educator provides knowledge and skills to the learners, serves as a change facilitator, and views students as equal partners. It is about time that educators understand the reason for learners being at school and what their objectives are (Rasebotja 2006).

The intention of the recent reforms of the country's educational system is to produce independent critical thinkers through life-long and learner-centred learning (Lombard and Grosser, 2008). Campbell (2007:1) notes that uncertainty in education is triggered by the choices that teachers must make regarding students' needs, appropriate subject matter and effective instructional strategies. Educators should commit themselves to spending more time with learners to assist them in facing the new challenges (Lekota 2007:15). Educators play a central role in the advancement of the transformation of the South African education system and strengthening of South Africa's abilities to meet the challenges that the twenty-first century is placing on them. There is a notion that not everyone who breathes is an educator, but neither is just anyone who stands in front of the class (Lekota 2007:15).

Potenza (2002:12) describes the role of educators as learning mediator; interpreter and designer of learning programmes and materials; leader; a scholar, researcher and a lifelong learner; an assessor and a learning specialist; and serving community, citizenship and pastoral needs. Educators are responsible for the provision of quality education. Quality education should teach children how to live in their communities as well as in the larger society (Asante 2006:25). The educator staff at schools is crucial for the achievement of quality education (Kuiper 2002:4).When children are not performing adequately in class, educators appear to be failing to execute their professional duties diligently (Kgosana 2006:21).

It is in the best interest of Limpopo provincial Department of Education to enhance teamwork in delivering quality education. On that background, the DoE (2010) outlined the role of teachers, parents and the province to include the following: they work in teams and find solutions through joint problem solving, they apply systems and teaching approaches that meet the needs of all children, they are flexible in how they implement the curriculum, they adapt their classroom methodology to ensure that all children receive attention, they continuously improve their skills to teach in inclusive classrooms, they have high expectations of all their learners and measure them against their peers and they respect disability and human rights.

### 2.4.2 The role of school managers as stakeholders in education

School management refers to the day-to-day running of the school and it includes the management of staff members and learners and overseeing the school environment and monitoring the learning activities (Baruth 2013:37). According to Baruth (2013:39), a school manager is an educator appointed or acting as head of a school. A school manager is a person who plans, organises, leads, controls and delegates the teaching and learning of the activities of the school. According to Mncube (2008), school managers are responsible for the day-to-day running and administrative duties of a school.

There is a critical need for all education managers to engage in the new society imbued with values and principles of an enlightened, modern and democratic constitution (Nkomo, McKinney and Chisholm 2004:1). Effective school managers set high expectations and standards for the academic and social development of all students (NAESP, 2002:19). The school manager cannot function in isolation. He or she must work together with members of the School Management Team (MT). The DoE (2010) has affirmed that the principal and members of the school management team play a vital role in policy implementation. Members of school management teams should take a lead in changing the attitudes of all stakeholders; they should establish school-based support teams that coordinate support to all learners in the school by meeting regularly, giving guidance to teachers and tracking support; they should encourage active parental participation in the school and learners' education. In addition, they should form networks with existing community resources such as school governing bodies (SGBs); care

givers; families; disability organisations; health and social services; non-governmental organisations (NGOs) and higher education institutions.

### 2.4.3 The role of parents as stakeholders in education

A parent is the person or guardian who is legally responsible for the custody of a learner, or a person who undertakes to fulfil the obligations of a guardian (SASA 1996). In other words, parents are the children's caregivers in the home. Parents can no longer be ignored or delegated to a minor role in education (Meier 2003:233). According to the DoE (2010), parents know their rights and those of their children; parents collaborate with teachers by staying informed and supporting their children with homework; they foster the independence of their children and have high expectations irrespective of their abilities or disabilities; they cannot be expected to pay for a classroom assistant to support their children at school; they are also assisted by a school to approach health services to obtain hearing aids or wheel chairs for their children.

According to Mehlape (2006), among other things parents have the following roles to play: determine the type of education that their children should receive; work closely with the school in monitoring the child's progress; work intimately with the child to identify his/her strengths and weaknesses in terms of learning; provide learning space at home for the child; buy the child school uniforms and additional Learner Support Materials (LSM); inform and take part in informal structures with an interest in education; attend and contribute effectively to parent evenings, meetings and fundraising for the school with other stakeholders; frequently visit schools to enquire about new developments regarding teaching and learning so that his or her interaction with the learner at home takes place in a more knowledgeable way; support all school-based stakeholders in their attempt to contribute positively to the partnership in the school (Mehlape 2006:4).

### 2.4.4 The role of government (the state) as stakeholder in education

The involvement of government in education is attested to by the fact that in each country there is a minister of education who is the political head of the education enterprise (Claasen 1995:28). Government in the form of the Department of Education is also an important stakeholder in

education (UNISA 2007:2). Government involves itself in education through its officials. The duty of government in partnership is to provide and monitor quality education to its people. The hallmark of the South African government's approach to education and training has been a commitment to address two priorities, namely achieving equitable access to education and improving the quality of education provision (SASA,1996). However, we cannot expect government solely to provide good education in every school on an equal basis, as it requires a lot of time, money and resources. According to Mehlape (2006:4), government should, among other things, do the following in order to contribute effectively in schools:  draft education legislations, ensure that all education legislations are fully implemented in schools; provide physical structures in schools so that effective teaching and learning can take place even during adverse weather conditions; provide in-service training for educators provide incentives in whatever form for educators so that they execute their tasks diligently and confidently.

The DoE (2010) further asserts that the province should  ensure that budgets make provision for Inclusive Education; the province prioritizes strategies which will strengthen support services to all learners in their neighbourhood schools; the province strengthens its special schools to function as resource centres; the province manages admissions so that no learners are unnecessarily referred for placement in special schools; the province ensures that learners transport systems are inclusive; the province ensures that all time all schools are resourced in order that they become accessible and have the necessary individual devices and equipment to support learners with disabilities. It is evident that the policies formulated from the national acts are being used as tools for redressing past injustice  by opening the doors of learning to all South African citizens irrespective gender, race, religion and disability status.

### 2.4.5   The role of business people as stakeholders in education

The state cannot provide all that is needed for the effective running of the school. The need for business partners and other NGOs cannot be overemphasised. According Mehlape (2006:5), the role of the business people in education includes, inter alia, that they should: provide schools with the help of government, some sophisticated equipment and resources such as computers, microscopes, overhead projectors and many more; make more funds available for learners to further their education after making it to tertiary institutions. Such learners may even come back

for employment in the same business, thereby bringing more persons that are skillful into the business industry and provide additional training for educators in scarce areas of Mathematics, Science and Technology.

## 2.5 GOVERNANCE OF PUBLIC SCHOOLS IN SOUTH AFRICA

It was a milestone in South African history when the Education White Paper 1 on Education and Training was gazetted in February 1995 (DoE, 1995a), which subsequently led to the gazetting of the South African Schools Act (Act 84 of 1996) (SASA). By introducing the SASA, the government devolved responsibility for school development and management to institutional level, in particular, to schools' governing bodies, which have the power to promote school development in a number of ways. An SGB is a statutory body of stakeholders that is democratically elected to govern school organisations. In other words, SGBs serve as the democratic governance in public schools and embrace the concepts of representivity, accountability, liability and partnerships (Serfontein 2010). It is solely responsible for the adoption and formulation of policies for public schools in line with the national policies and regulations. Among others, SGBs have powers in eliciting additional funds and improving school facilities. By introducing this piece of legislation, the ANC-led government wanted to emphasise the issue of equity and access to basic education.

## 2.6 TRANSFORMATION OF THE EDUCATION SYSTEM IN LIMPOPO PROVINCE

Limpopo, like any other province in South Africa, is experiencing transition in terms of education provision. A pressing need has emerged over the past four years in Limpopo Province to improve school management and learner achievement, the need that culminated in the development of a turn-around strategy (Limpopo Department of Education 2011:29). Aspects of learner achievement and effective school management underline the goals promulgated by the Limpopo Department of Education and reflect the call by the Limpopo Department of Education for ways to improve school management and learner achievement (LDoE, 2011:29).

## 2.7   THE IMPACT OF EDUCATORS' UNIONS IN THE IMPLEMENTATION OF EDUCATION POLICIES

Oosthuizen (1994:127) points out that in South Africa the organised teaching profession consists of a number of organisations, the largest being the South African Democratic Teachers Union (SADTU). The organised teaching profession is a major role-player in education and renders an important service to the teaching profession. The involvement of teacher unions during policy implementation is viewed as an impediment to learner success when democratic governance is regarded as non-existent. The literature indicates that where there has been collaboration between the education department and the unions, such collaboration is viewed as a key to the successful implementation of policies (Bascia 2011:210-213; Poole 2000:698-725).

Souden (2001:33-43) argues that educators in different provinces and schools in South Africa reacted differently to new policies because of the unequal levels of professionalism and development, including their readiness for change. The implementation of policies at school level has been marred by conflict between School Management Teams (SMTs) and union members. Chisholm *et al* (2004:398) reported on incidents in the Western Cape where schools refused to implement rationalisation policies, and principals were even threatened with "disciplinary procedures" by departmental officials. It was further reported that where schools refused to rationalise, the Department of Education instructed educators to leave.

The perceived status of unions as watchdogs of educators' interests and the departmental officials as custodians of government policy make it difficult to create a culture of cooperation among the various stakeholders. This leads to problems that hinder the smooth implementation of policies meant to benefit learners. Sayed (2002: 29) refers to this as the "policy gap" that is understood as the mismatch between policy intention, policy practice and outcome. According to National Professional Teachers Organization of South Africa educators are key role players in the delivery of curriculum to the learners and their welfare should be taken care of  at all cost.

## 2.8 An overview of international experiences on the implementation of education policies in schools

I studied the education systems of other countries with the intention of making comparisons to identify similarities and differences, and challenges facing those countries in the implementation of policies towards the provision of quality education. African countries as well as countries from other continents in the world were sampled. Common factors that contribute to the success of education systems were studied for each country to form the basis of possible yardstick that can be used to measure how far is South Africa in terms of the implementation of education policies.

### Zimbabwe

Programmes such as the Education Transition Fund (ETF), the Child Friendly Schools Initiative (CFSI) and the Basic Education Assistance Module have played a critical role in assisting Zimbabwe's education system get back on its feet. Through the first phase of the ETF launched in 2010, Zimbabwe has managed to achieve a pupil to textbook ratio of 1:1 in the four core primary-school textbooks and six core secondary-school textbooks down from around 1:10 in previous years (Gara 2010; Chakanyuka 2004). The need for adequate resources is key to the provision of quality education.

### Botswana

Botswana was a British Protectorate for 81 years, from 1885 to 1966. During the pre-colonial era, Botswana had a traditional form of education, which "was part of a whole system of belief, or religion, as well as a means of socialising children into the accepted norms of society" (Parsons in Crowder 1994:22). Parsons classifies traditional education into three categories: informal, formal and vocational education. There was informal education in the home, which was mainly parenting, and included relations among siblings, with special emphasis on the aged as repositories of wisdom. Formal education was characterised by "*bojale*" and "*bogwera*", adolescent initiation schools for females and males, respectively. In *bojale*, young female adults were formally taught matters concerning womanhood, sex, behaviour towards men, domestic and

agricultural activities. *Bogwera* was formal instruction for young male adults, where they were circumcised and taught skills such as karoas sewing for shields and clothing, and modelling cattle in clay to reinforce practical knowledge of livestock. They were trained to be responsible men, warriors and fathers. The transfer of moral values from one generation to the other is valued as part of compulsory education for all learners. Subjects such as Life Orientation, Social Science and Arts and Culture are offered in South Africa to teach similar skills, knowledge and values necessary for everyday lives. Secondary education in Botswana is neither free nor compulsory. In Botswana's education system, girls and boys have equal access to education. Approximately half of the school population attends a further two years of secondary schooling leading to the award of the Botswana General Certificate of Education (BGCSE) (Abosi and Kandjii-Murangi 1998). The same model holds for the South African education system.

*Zambia*

Despite several changes that have occurred during the past three decades, the Education Act of 1966 continues to set the basic framework for the system. The Act has not been comprehensively reviewed to cater for the changes and developments that have occurred. Zambia attained her political independence from Britain on 24th October 1964. Up to that point, during 75 years of colonial administration, provision of education in the country was mainly in the hands of missionaries. Had it not been for the missionaries, primary and secondary education could have delayed much longer coming to Zambia than was the case.

The Ministry of Education in Zambia has set itself the following goals: increasing access to education and life skills training, provision of quality education, effective coordination of policies, plans and programmes; rationalisation of resource mobilisation for effective teaching and learning. The Inspectorate is tasked to ensure quality of education through the examination of major curriculum areas and materials such as school resources and staffing levels, examination and assessment, pre-service training programmes, and important organisational features or management (Brynard 2005; Ndamba 2010:246).

*Nigeria*

The Nigerian education system witnessed tremendous expansion between independence in 1960 and 1995. However, the rate declined in 1986 during an economic depression. Changes in the government due to military coups, a depressed economy and unplanned and uncontrolled education expansion all created an environment of crisis in the education system. The crises included those of poor funding, inadequate facilities, admission and certificate racketeering, examination malpractices, general indiscipline and the emergence of secret cults. Personnel management problems resulted in frequent strikes and closures and the abandonment of academic standards (Nwagwu, 1997).

Nwagwu (1997) argues that minimum standards in education should be perceived as yardsticks for responding positively to the challenges of relevance, need satisfaction, quality and excellence in the education system. Therefore, any system that fails to meet the population's expectations of providing the knowledge, skills, values and attitudes they require to solve individual and societal problems, has fallen below the expected standards. This analysis of the condition of education in Nigeria shows that unplanned and uncontrolled expansion of the system, inadequate funding, corruption and poor management are mainly responsible for the many types of crises there are today (Nigeria 1997). The organisational climate is not conductive to serious teaching and learning.

The inadequacy of the infrastructural facilities to cope with the very rapid rate of expansion in student enrolment is a major source of crisis in the education system. The first is a high birth rate, thus providing a relatively young population with 48 percent of the total population under 15 years of age. The second reason is economic depression and inflation, which have made it difficult to build new schools (Anikeze 2011)

*Namibia*

In Namibia, Pre-schools and Kindergartens are completely privately owned, and schools mainly by the State. There are over 1500 schools in the country, of which about 100 are private schools, mainly farm schools. The Namibian Constitution and the Education Act (2001) states the frame

for the educational system: Compulsory school attendance exists for the seven years of primary school, respectively for children between the age of six and sixteen. School fees are not allowed for primary education. In the first three grades, the lessons are given in the mother tongue of the majority of the students. In grade four, the switch to English is to be introduced, so that from grade five on, English is the only language to be used for teaching and tests. After finishing grade twelve, the student receives the Namibia Senior Secondary Certificate (NSSC) and is allowed to attend a Namibian university (Ministry of Education and Culture 1993).

### Romania

According to Karner-Hutuleac (2013:87), the Order of the Ministry of Education, Research, Youth and Sport legislation pack of 2011 in Romania (OMECYS) states that the lack of specialized knowledge in the field of special psycho-pedagogy and psycho-pathology makes harder the collaboration between teachers and students with disabilities and even the collaboration between the school staff and the support teacher and school counsellor. Karner-Hutuleac (2013) further states that the role of these professionals, although promoted, is not known by all the staff and sometimes by parents or tutors, and school practices give him reasons to believe that there it is still a long way to go for Romania to achieve the implementation of the Romanian Inclusive Education policy. Another problem related to the integration of children with special education needs in mainstream schools in Romania, according to Karner-Hutuleac, is the small number of support teachers (these ensure the implementation of Personalised Intervention Projects, the monitoring and assessment of integrated children and pupils' progress), and overloading them with job duties. Challenges in inclusive education policy implementation in Romania is more or the same as in South Africa.

### United States of America

According to the U.S. Department of Education (2008:33) the United States government strongly supports UNESCO's goal of Inclusive Education and ensuring access to educational opportunities for all learners. According to the U.S. Department of Education, America is making strides in fully implementing the Individuals with Disabilities Education Act thus ensuring quality education for all children with disabilities.

According to Mentz and Barrett (2011:44), in both Jamaica and South Africa, there have been many challenges for schools regarding the implementation of Inclusive Education. Not only is it a paradigm shift that happens in schools and communities, but it is also a shift of mindset for educators. Both countries have, however, demonstrated a commitment to Inclusive Education and the equipping of school administrators with the skills to respond effectively to the diverse needs of all learners and promote Inclusive Education in their schools. I reviewed literature on the implementation of Inclusive Education Policy in foreign countries with the particular aim of comparing phenomenon that have common variables.

## 2.9   SOUTH AFRICAN EDUCATION POLICIES AFTER 1994

South Africa has different types of courts that serve the citizen at different levels. According to Squelch and Bray (1997:11), the South African Court System is responsible for monitoring and enforcement of the law and has been divided into the following levels, namely Constitutional Court, Appellate Division Supreme court, Provincial and local divisions Supreme court, and other courts such as Magistrate's courts. Below, I selected and discussed policies that seem to impact largely on the provision of education in public schools.

### 2.9.1   Constitution of the Republic of South Africa (Act 108 of 1996)

The constitution is the supreme law of South Africa and contains the most important provision that controls the relationship between the state, also referred to as a nation or country, and those living in it (Bray 2008:25). Bray defines the constitution as a set of rules that stipulate how the state is governed, i.e. it determines the functions and powers of the government (Bray 2008:27). On 8 May 1996, the Final Constitution of the Republic of South Africa, Act No. 108 of 1996 was approved by the Constitutional Assembly (Bray 2008:6). The Constitution of South Africa is considered the basis of South African democracy, and recognises eleven official languages (Bray 2008:28-29).

As a result of the constitutional changes and the transition to a non-racial democracy, education legislation had to be altered and new legislation came into being as steps were taken to develop a single non-racial democratic educational system (Botha 2004:259).

Section 32 of the Constitution of the Republic of South Africa (Act 108 of 1996) deals with education and provides that every person shall have the right:

    (a) To basic education and to equal access to educational institutions;

    (b) To instruction in the language of his or her choice where this is reasonably practicable; and

    (c) To establish, where practicable, educational institutions based on a common culture, language or religion provided that there shall be no discrimination on the ground of race.

In this study, I evaluated the extent to which the education managers are implementing the sections of the law that directly affect the provision of quality education in public schools. The transformation of education in South Africa emphasises the right of all to quality education (DoE 1995a). The first intent is to redress the discriminatory, unbalanced and inequitable distribution of the education services of the apartheid regime, and secondly to develop a world-class education system suitable to meet the challenges of the twenty-first century (Seedat 2004:9). As a remedy for the above, the Constitution of the Republic of South Africa (Act 108 of 1996) provides the basis for curriculum transformation and development in South Africa.

### 2.9.2 National Education Policy Act (Act 27 of 1996)

This Act provides the necessary guidance for drawing up and implementing a school-based policy within the legislative framework of the Schools Act. Its purpose is to facilitate the smooth progress of democratic transformation in South Africa in order to serve the needs and welfare of everyone and to support their basic rights (Shaba, Camper, Du Preez, Grobler and Look 2003:17). Although the school may determine some of its own policies, it should still consult the National Education Policy Act and the Schools Act for guidance to ensure the legitimacy of its policies. Policy development should also be regarded in a national context, because global forces influence education, and a complete natural balance of change needs to be well thought-out to oppose this global influence (Shaba *et al* 2003:17). The objectives of the NEPA No. 27 of 1996 are to provide for: the determination of national education policy by the Minister in accordance with certain principles; the consultations to be undertaken prior to the determination of policy,

and the establishment of certain bodies for the purpose of consultation; the publication and implementation of national education policy; the monitoring and evaluation of education. NEPA assists provinces in providing education in line with policies that support the Constitution of the country.

### 2.9.3  South African Council of Educators Act (Act 31 of 2000)

The South African Council of Educators Act is closely monitored by the South African Council of Educators (SACE) so that it fulfils the following objectives:

> (a) It must promote, develop and maintain a professional image of teaching as profession.
> (b) It must compile, maintain and from time to time review a code of professional ethics for educators who are its members.
> (c) It must advise the minister on any educational aspect.
> (d) It must institute a disciplinary hearing against any educator who is its member.

This Act attempts to ensure that educators conduct themselves in a manner that does not contradict the values of their profession. This policy was legislated after the new democratic order was instituted, with the objective of introducing the new education system that will benefit all the citizens of the country.

### 2.9.4  Employment of Educators Act (Act 76 of 1998)

The Employment of Educators Act (Act 76 of 1998) came into effect in 1998, replacing the Educator's Employment Act of 1994. The aim of this Act is to rationalise conditions of service and dismissal procedures.

Section 33(1) of EEA states that unless an educator's conditions of service provide otherwise –

> (a) an educator shall place such time as the Minister may determine at the disposal of the employer;
> (b) no educator shall without permission of the employer perform or undertake to perform remunerative work outside the educator's official duty or work;

(c) no educator may claim additional remuneration in respect of any official duty or work which the educator –

    i.    performs voluntarily; or

    ii.    has been ordered to perform by a competent authority.

(2) The employer may order an educator to perform duties on a temporary basis other than those duties ordinarily assigned to the educator which are appropriate to the grade, designation or classification of the educator's post.

### 2.9.5  Employment Equity Act (Act 55 of 1998)

Provision is made in the preamble of the Employment Equity Act (Act 55 of 1998) for promoting the constitutional rights and the exercise of true democracy:

    i.    The elimination of unfair discrimination in employment;

    ii.    Ensuring the implementation of employment equity redress;

    iii.    To achieve a diverse workforce broadly representative of the people of South Africa; and

    iv.    To promote economic development and efficiency in the workforce.

The purpose of the Employment Equity Act (1998) is to achieve equity in the workplace by

- Promoting equal opportunity and fair treatment in employment through the elimination of unfair discrimination;
- Implementing affirmative action to redress past inequalities in the workplace by promoting the employment and promotion of individuals from previously disadvantaged backgrounds.

The rationale for introducing the Employment Equity Act (Act55 of 1998) was to enforce transformation on the basis that organisations would not empower sufficient numbers of black employees of their own free will (Leonard and Grobler 2006). The gender policy landscape in education has seen a number of policies enacted that address gender issues in education. Nel, Nel and Hugo (2012) further postulate that the principle of distribution based on equity may raise

concern about the justice perceptions of the parties concerned of the tripartite employment relationship (viz. government, employers and employees) in two respects.

Employment Equity appointees lack the necessary skills and are appointed either to fill quotas or for window dressing, EE implies inferiority and stigmatises its beneficiaries; EE decisions are based on preferential treatment instead of merit (Vermeulen and Coetzee 2006). There has been a problem with designated groups because the demographics in South Africa have been artificially established by influx control and other policies (Bendix 2007). The employment of personnel not suitable for the job may affect the implementation of education policies at departmental management levels.

### 2.9.6  Public Finance Management Act (Act 1 of 1999)

The aims of the Public Finance Management Act (PFMA) are to regulate financial management in the national government; to ensure that all revenue, expenditure, assets and liabilities of that government are managed efficiently and effectively; to provide for the responsibilities of persons entrusted with financial management in that government; and to provide for matters connected therewith. The objective of this Act is to secure transparency, accountability and sound management of the revenue, expenditure, assets and liabilities of the institutions to which this Act applies.

### 2.9.7  South African Schools Act (Act 84 of 1996)

There is no difference between the SASA and any other legislation concerning the main purpose, i.e. to maintain order and harmony between all concerned parties. As regards education, "all parties" include those who have some interest in education (Joubert and Prinsloo 2009:25). Because of the history of unfair discrimination towards race, colour and ethnological descent in education, the School's Act aims to guide all towards a system of government that offers quality education for everyone to develop their talents to the fullest. It also gives guidance on how the state should fund schools (Joubert and Prinsloo 2009:25). This is evident in the Preamble to the SASA, which states that, "This country requires a new national system for schools which will redress past injustices in educational provision, provide an education of progressively high

quality for all learners and in so doing lay a strong foundation for the development of all our people's talents and capabilities".

### 2.9.8   Labour Relations Act (Act 55 of 1996)

According to section 27 of the Constitution (1996), every person shall have the right to fair labour practices. Therefore, in terms of this section and general labour relations legislation, employees and employers will have the following rights that are subject to section 33 (1) of the constitution and deals with the limitation of rights. Employers have the fundamental right to establish or join an organisation or to refrain from establishing or joining an employer organisation; negotiate collectively with employees on matters that may arise out of the normal working relationship; have access to dispute settlement procedures with regard to dispute of rights and interest; be protected against unfair labour practices; employ employees in accordance with needs, due regard being paid to fitness, qualification, level of training and competence; strike.  The right to strike seems to be impacting negatively on the South African education system. State statutes vary with regard to the definition of a strike. Kansas defines a strike as any "action taken for the purpose of coercing a change in the terms and conditions of professional service or the rights, privileges or obligations thereof, through any failure by concerted action with others to report to duty including, but not limited to, any work stoppage, slowdown, or refusal to work". Where such broad and vague definitions apply, courts may consider organised refusals to perform extracurricular duties or work-to-rule actions as strikes. The researcher focused on the wellness of the learners when their right to education is affected by the rights of educators to strike.

### 2.9.9   National Curriculum Statement (Curriculum 2005)

The government's intention of introducing the new curriculum as a way of moving away from an old content-based education to a new outcomes-based education which aimed at addressing the legacy of the past was perceived as a move in the right direction (Le Roux 1997:6). OBE puts emphasis on the learner as a unique person with his/her own capabilities and background. Educators are seen as facilitators to assist the learners to move forward at their own individual pace (UNISA, 2000:22).

Since South Africa's first post-apartheid elections in April 1994, the Ministry of Education has introduced national curriculum reform initiatives focused on schools. The first attempted to purge the apartheid curriculum (school syllabuses) of racially offensive and outdated content (Jansen 1998), while the second introduced continuous assessment into schools (Lucen *et al* 1988). Curriculum 2005 aimed at integrating education and training, promoting lifelong learning for all South Africans; focusing on outcomes rather than content; equipping all learners with knowledge, competencies and orientations; developing a culture of human rights, multi-lingualism, multiculturalism and a sensitivity to the values of reconciliation and nation building; and producing thinking and competent future citizens (DNE 1997 [a]; UNISA 2000:3). The change in education policy has set new and more challenging demands on educators (Vandeyar, 2005:461).

**2.9.10  Skills Development Act (Act 97 of 1998)**

The objectives of this Act are to provide national, sector and workplace strategies to develop skills in the workplace and to provide financing by means of a levy-grant scheme with employees. The competencies of the public servants in executing their day-to-day activities are the priority of the South African government. Education managers, governors and educators should be inducted and trained on basic aspects of their responsibilities in the Department of Education.

## 2.10  POLICY IMPLEMENTATION

According to Pressman and Wildavsky (1973: 23) in their study on minority job creation policy, policy implementation is the process of interactions between the setting of goals and the actions geared to achieving them. Proper implementation requires government officials to translate broad agreements into specific decisions. In general, implementation research is supposed to have evolved through three generations. The first generation of research ranged from the early 1970s, the second generation from 1980 to 1990 and the third generation research from 1990 and onwards (Matland 1995). Three phases of implementation research can be identified in the literature (Goggin, Bowman, Lester and O'Toole 1990; Howlett and Ramesh 1995; Pal 2006). In the 1980s, moreover, the process of policy implementation was influenced by structural changes

in public administration towards decentralisation, devolution of responsibilities, partnerships, and the restructuring of accountability relationships in service delivery (Kettl 2000; O'Toole 2000; Pal 2006). Thus, one notices the broadening of the approach to research on policy implementation into a multi-focus perspective that looks at a multiplicity of actors, loci and levels (Hill and Hupe 2003). In turn, this leads to the adoption of other disciplinary approaches to the study of policy implementation. Thus, the study and use of techniques, form, strategic management, organisational change and organisational culture served to complement and sometimes also obscure implementation studies (Schofield and Sausman 2004:236).

Implementation inevitably takes different shapes and forms in different cultures and institutional settings. This point is particularly important in an era in which processes of 'government' have been seen as transformed into those of 'governance' (Hill and Hupe 2002:1). Implementation literally means carrying out, accomplishing, fulfilling, producing or completing a given task. The founding fathers of implementation, Pressman and Wildavsky (1973) define it as a relationship to policy as laid down in official documents. According to them, policy implementation may be viewed as a process of interaction between the setting of goals and actions geared to achieve them (Pressman and Wildavsky 1984). Policy implementation encompasses those actions by public and private individuals or groups that are directed at the achievement of objectives set forth in policy decisions. This includes both one-time efforts to transform decisions into operational terms and continuing efforts to achieve the large and small changes mandated by the policy decisions (Van Meter and Van Horn, 1975:447).

According to Jnsen (2001:272) everyone wants to believe that new education laws and education policies are intended to bring about serious changes in a country. We all have a deeply held sense that government means what it says in its new policies and assume that what policy intends will happen within schools and classrooms. We all assume that policy moves logically and naturally from intention to realisation and that policy is devoid of politics and of conflicting power struggles. Jansen (2001:272) has claimed that the making of education policy in South Africa is best described as a struggle for the achievement of a broad political symbolism to mark the shift from apartheid to post-apartheid society. Looking at the prominence assigned to the symbolic value of policy rather than the implementation thereof, one has to agree with Jansen. Again

referring to the set of policies and new education laws developed by the South African government within a span of three years there is little evidence of successful implementation of these laws and policies. The media constantly reports on schools, educators, principals, governing bodies and departments of education involved in legal wrangles and actions that result from their inability to translate the official version into contextual reality.

### 2.10.1  Possible causes of faulty implementation

Policy implementers may implement the policies as per the expectations of the policy-makers or sometimes go astray. Faulty implementation occurs when the objectives between each causal link are not met. This could be because of: the lack of funds to carry out tasks; the lack of political will; the lack of capacity to carry out policy aspirations; an inappropriate policy; the causal chain being too long, which leads to unpredictability in implementation (Pressman and Wildavsky 1973:143).

### 2.10.2  Challenges faced in policy implementation

Policy implementation is a complicatedand non-automatic issue that needs stable techniques and procedures, strong impetus, co-ordinated efforts, organisational redefinition and ownership of the policy in question (Khalid 2001:88). Herman and Herman (1984:25) maintain that success depends on policy design, implementation strategy, commitment and capacity of the bureaucratic system, and environmental factors. Nakamura and Smallwood (1980:46) state that the implementation of policies is dependent on economic factors such as the availability of money and other resources, on geographic considerations such as territory jurisdiction, and on sociological factors such as interpersonal work relationships. Key influences within the policy implementation process are actors and arenas, organisational structures and bureaucratic norms, and communications networks and compliance mechanisms (Nakamura and Smallwood 1980:46).

From the policy change and learning theory above, it can be seen that the policy subsystem plays a significant role in policy change. In addition, in terms of policy implementation, street-level bureaucrats, as part of the subsystem, have important roles in implementing the policy since they

are directly involved in local conditions to meet stated policy goals or objectives. Policy changes depend on five variables, namely policy outputs of implementing agencies, target group compliance with policy outputs, actual impacts of policy outputs, perceived impacts of policy outputs, and major revision in statute or policy (Chandarasorn, 2005). According to Chandarasorn (2005:145), part of successful policy implementation comes from a strong implementing agency which can be seen in a good decision-making system, communication system and sufficient human resources.

Implementation of policies has been a challenging experience in government institutions, including those within the Department of Education. According to Motala (2000:78), the complexity of the national-provincial relationship, that is, the implications of fiscal federalism and the specific conditions in education reform, were not clearly laid out, presenting enormous difficulties for those responsible for policy implementation at provinciallevel. Rural provinces were most affected since the bureaucrats from former homelands were not capacitated enough to cope with the level of expertise that was required by the Finance Department to perform their work effectively. Limpopo Province is likely to experience the same challenges, as most of its areas are rural and poverty-stricken villages.

Educators are key role players in curriculum delivery as they interact with learners. In terms of behaviour, educators cannot be exonerated from the dysfunctional status of many schools. There could not be any normal education in an abnormal society (Mamaila 2005:20). According to the very negative view of  Mamaila (2005:20), most educators are no good. They have lost work ethics, are disloyal, work half-heartedly and arrogantly, demand privileges with no intention of counter-achievements. Educators often take their kids out of the townships and rural schools to former Model C schools in towns and cities. As a result, they do not commit themselves to give children from disadvantaged rural communities the quality education that their children are getting. (Letswanyo 2002:19). They spend more time at their business in cities and towns than at school (Motala 2000:1). The most popular businesses run by teachers include spaza shops, catering businesses, taxi operations and government tenders (Mangena, 2005:3).

The behaviour of the educators may be influenced by the stressful working environments in which they find themselves. Educators work under extremely difficult conditions and many

achieve miracles in their classrooms (Mecoamere 2007:16). Effective teaching has everything to do with educators who are committed to their school work (Mecoamere 2007:5). The divided attention of educators in teaching as a profession may leave the provision of quality education in public schools compromised in one way or another.

## 2.10.3 Requirements for successful implementation of education policies

Successful implementation requires compliance with statutes, directives and goals; achievement of specific success indicators; and improvement in the political climate around a programme (Hill and Hupe 2002:75). In this line, Giacchino and Kakabadse (2003) assess the successful implementation of public policies on decisive factors. According to them, these are the decisions taken to locate political responsibility for the initiative, the presence of strong project management or team dynamics and level of commitment shown to policy initiatives. Questions of motivation and commitment reflect the implementers' assessment of the value of a policy or the appropriateness of a strategy.

According to Fredriksen (2007:15), the requirements for successful implementation of education policies are political leadership, careful planning, phasing in reforms; communication and building of partnerships. I therefore interviewed the education managers at various education management levels in order to establish their level of readiness for policy implementation.

Chukanuka (2006:42-43) suggests four standard criteria and indicators for the evaluation of a project's effectiveness, namely the level of goal attainment, which indicates how the project fulfilled its goals; the level of public participation, which indicates how the public was involved in the success of the programme; the level of public satisfaction, which is the measurement of public satisfaction over the services; and lastly the level of risks of the project when it was implemented. Therefore, for implementing policy successfully according to these criteria, leaders of agencies or organisations need to possess leadership in such a way that it can create good teamwork among members of the organisations. Rewards can be used as incentives for good work. In addition to leadership and cooperation, efficiency in planning and control is necessary for successful implementation. Conditions for this efficiency include clarity and feasibility of the policy, and proper work assignment and evaluation. Lastly, it is inevitable that politics and the

external environment have an impact on implementation performance. Elements of this factor include the level of efficiency in planning and control; leadership and cooperation; politics and external environment management; capability of implementers; success of policy implementation and the support from other related organisations, negotiating power and socio-economic conditions

According to Khumalo (2008:90), the process of transforming education in South Africa has taken root visibly at all levels of the system and the process has not been without challenges. Singh and Lokotsch (2005:279) argue that at no time in our existence was change more imminent and the future more challenging than in our schools. Since the new government took over, it has introduced radical policies in education and schools. The National Education Policy Act (Act 27 of 1996), in the Education Labour Relations Council (2003) explains that"it is necessary to adopt legislations to facilitate democratic transformation of the national system of education into one that serves the needs and interest of all the people of South Africa and upholds the fundamental rights".

There are prerequisites for the effective implementation of education policies. Fredriksen (2007:15-20) lists and highlights the following important requirements for the successful implementation of policies:

*Political leadership*
Strong political leadership at the highest (national and provincial) level plays an important role in successful policy implementation, especially when the policy originates from current policies (Fredriksen, 2007:15).
*Careful planning*
Fredriksen (2007:15) states that success requires careful planning and that careful planning involves a number of activities, such as prior analytical assessment of the magnitude, use and replacement of existing fees, construction of strategies necessary to address possible policy implementation challenges, and building implementation and monitoring capacity.
*Communication/building partnership*

A comprehensive communication and consultation process with the key stakeholders is of great importance.

*Phasing-in the reforms*

The phasing in approach imparts a state of readiness to policy makers, implementers and beneficiaries.

*Community involvement*

The supportive community could render voluntary services, and sponsor school activities through donations.

Policies may not yield good results just because of their nature or quality. Cheng and Cheung (1995:160) list preparations for policy implementation as a key area for the success and smoothness in the implementation. Preparation for educational policy implementation includes the readiness of the concerned parties, the readiness of resources, the timeframe of implementation, and the legal preparations. Readiness of the concerned parties includes the cognitive, psychological and technological readiness of the education officers, school administrators, teachers, learners, parents and other interested professionals (Cheng and Cheung 1995:17). In addition, Cheng and Cheung (1995:180) maintain that hasty policy implementation will not only be unsuccessful but will receive criticism from the public. Policy makers undertake to protect and respect the legal rights of all concerned parties through legal preparations (Cheng and Cheung 1995:18). These enhance the psychological and cognitive readiness of the concerned parties to support the policy implementation.

Cognitive readiness refers to the comprehension of the policy objectives and possible consequences of implementation of the policy. Psychological readiness indicates the willingness in concerned parties to support and be enthusiastically involved in implementation of the policy. Regarding readiness of resources, Cheng and Cheung (1995:17) mention human resources, equipment and facilities, accommodation or space and monetary resources. If resource requirements and their use and availability are not fully calculated beforehand, there will be difficulties during the policy implementation. The time-frame of implementation includes the availability of time and feasibility of the schedule. Cheng and Cheung (1995:18) maintain that hasty policy implementation will not only be unsuccessful but will receive criticism from the

public. Policy makers undertake to protect and respect the legal rights of all concerned parties through legal preparations. This enhances psychological and cognitive readiness of the concerned parties to support the policy implementation. Political uncertainty is an endemic condition to policymaking and implementation. Political uncertainty refers to military threats, domestic violence, political regime change and so on (Cheng and Cheung 1995:18).

## 2.10.4 Educational change and its challenges on policy implementation

One of the biggest impacts of new legislation and policy is that it has raised the need for greater accountability. We need to be able to account for and be able to justify our actions in relation to policy. As you have learnt, policies in turn need to be informed by appropriate legislation and all legislation has to be justified against the Constitution. Policies may bring about required changes in the education system. Amos, Ristow and Pearse (2008:269) maintain that successful change does not simply happen, but it has to be carefully thought through, conceptualised, planned in detail and implemented. In doing this, it is necessary to determine why change is required, what needs to change and what the desired state is. The nature of change will also determine the strategies to be employed in the implementation process. Change may range from being technocratic, social, interactive, competitive, optional, to incremental and transformational.

Change therefore is not a coincidence. According to Hudecki (2002:58), transformation refers to a "… marked change in the nature, form or appearance of an organisation…"(in this instance, education). The South African Schools Act (Act 84 of 1996) demands sweeping educational reform. It states that South Africa needs a new system to redress injustices, to improve educational quality and to lay the basis for developing peoples' talents, democratically transforming society, fighting discrimination, eradicating poverty, advancing diversity, protecting individual rights and equal access to quality education. No matter what good change may bring to the institutions or organisations, resistance to effect changes may also occur. The perceptions of personnel on change may differ as they may be from different social, political or economic backgrounds. Robbins and Coulter (2009:280) assert that people resist change in an organisation for many reasons. Some of these reasons include uncertainty, habit, concern about personal loss and the belief that the change is not in the organisation's best interest.

Amos, Ristow and Pearse (2008:274) maintain that it can be anticipated that there will be resistance to any change initiative at some stage from at least some quarters in the organisation. Sources of individual resistance include aspects such as stress experienced by individuals, a lack of information or misunderstanding and a lack of awareness of the need for change. Group level resistance to change occurs due to the group being prevented from participating in the decision-making processes related to proposed change. At the organisational level, typical barriers to change include aspects such as a preoccupation with seeing immediate financial benefits of change, lack of coordination and cooperation, threats to existing power, reward systems that are out of alignment with proposed change, etc. (Amos, Ristow and Pearse 2008:275).

According to Mchunu (2010:24), many schools still suffer the consequences of poor school management and poor learner academic performance, either "… because they do not handle educational change properly for their improvement, or because they are not prepared to venture into uncertainty. Change is endemic to the human condition" (Maxwell 2005:93). Schools must therefore be prepared and able to deal with educational changes, for example, curriculum changes, self-governance and participative management of different levels.The literature review revealed that South African education is in the process of reconstruction and change (Miles 1994a:63). According to Christie (1998:290), changing management to manage change suggests the need for change towards a more participatory and reflective management style in South African schools. Therefore, the role of school communities in an educational context cannot be underestimated, as they (school principals, teachers, parents and learners) are the primary role players who will be able, according to the researcher, to ensure the successful management of educational change. Resistance to change is a worldwide phenomenon and applies to South Africa. Very few educators show interest in changing their teaching habits (Loubser and Roath 1996:126). The new curriculum is characterised by multiculturalism to cater for South Africa as a rainbow nation. Multicultural education values diversity and includes the perspectives of a variety of cultural groups. According to Santrock (2008:157), an important goal of multicultural education is equal opportunity for all learners. Multicultural education is able to increase this educational equity by allowing individuals from diverse backgrounds to have an equal opportunity to achieve academically at school (Woolfolk, 2007:161; Tiedt and Tiedt, 2010:25).

### 2.10.5  Readiness in policy implementation

The positive attitude of education managers on policy matters is one of the keys for their effective implementation. Cheng and Cheung (1995:16) list preparation for policy implementation as a key area for the success and smoothness of the implementation. Preparation for educational policy implementation includes the readiness of the concerned parties, the readiness of resources, the time-frame of implementation, and the legal preparations (Cheng and Cheung, 1995:17). Readiness of the concerned parties includes the cognitive, psychological and technological readiness of education officers, school administrators, teachers, learners, parents and other interested professionals (Cheng and Cheung, 1995:17). Cognitive readiness refers to the comprehension of the policy objectives and the possible consequences of implementing the policy. Psychological readiness indicates the willingness in concerned parties to support and be enthusiastically involved in implementation of the policy. Regarding readiness of resources, Cheng and Cheung (1995:17) mention human resources, equipment and facilities, accommodation or space and monetary resources. If resource requirements and their use and availability are not fully calculated beforehand, there will be difficulties during policy implementation. The timeframe of implementation includes the availability of time and the feasibility of the schedule. Cheng and Cheung (1995:18) maintain that hasty policy implementation will not only be unsuccessful but will receive criticism from the public.

## 2.11  MODELS OF POLICY IMPLEMENTATION

The second generation implementation studies focused on describing and analysing the relationships between policy and practice. These researchers generated a number of important lessons for policy practice and analysis. (Mc Laughlin 1987:176). The second-generation research also taught researchers the importance of time periods: at what point in history implementation occurs and over what period of time (Goggin *et al* 1990:15). According to Goggin *et al* (1990:14), the second-generation research was engaged in the development of analytical frameworks. The construction of models and research strategies, however, immediately led to a major confrontation between the so-called top-down and bottom-up perspectives of policy implementation (Winter 2003:213). Until now, no general implementation theory has emerged although many implementation scholars have had the development of such a

theory (Winter 2003:205). However, as implementation research evolved, two schools of thought developed for studying and describing implementation: top-down and bottom-up. I therefore evaluated the implementation of education policies by circuit managers based on the type of implementation style. The effectiveness and limitations of each implementation style was be identified.

The top-down rational model has been adopted in Limpopo Province. In this regard, Kallay (2007:30) argues that there is wide agreement based on international research that top-down policy solutions seeking to bypass educators are not going to bring the desired results. These concur with what May (2002:224) states, "It failed to recognize the political realities that account for policies with multiple goals, vague language and complex implementation structures". The top-down policy implementation model is characterised by concepts such as street-level bureaucrats and policy-makers. According to Winter (2003:214), Lipsky claims that street-level bureaucrats are the real policy makers. Implementers are likely to make varied interpretations because policies, regulations and laws have interpretive aspects. Therefore, policies may not always yield the expected outcomes (Davis 1991). Street-level bureaucrats (policy implementers) are those who support the backward mapping perspectives and believe that policy analysis should focus on the public servants who carry out policy rather than on those who formulate it (Lipsky 1973:13). I examined education policies with the aim of evaluating if they did achieve what they were intended for.

## 2.12  POLICY DELIVERY SYSTEMS

### 2.12.1  The governmental mix

Responsibility of delivery of public goods and services in the governmental mix is taken by different levels of government. Parsons (1995) identifies the levels as national, regional/state, local and neighbourhood. The main emphasis in such cases has been decentralisation of functions. Decentralisation may be viewed as an attempt to download control to more built-in, self-regulatory delivery systems (Kickert, 1993; Farazmand, 1997). Peters and Wright (1996) observe that as a move towards decentralisation, central governments have permitted sub-national governments to make locative decisions about who will get what from the public sector.

The move also includes empowerment of employees of government in lower echelons to acquire more power and control over their own jobs in order to increase the satisfaction of clients. They have been given greater latitude to make decisions and then become accountable for those decisions (Kernaghan 1992). The division of responsibility of policy delivery to different levels means administrative and financial arrangements, including powers granted to different levels, are determined by political and constitutional traditions.

In South Africa, for example, the governance of the school has been decentralised to the parents, educators and learners who are stakeholders of particular schools (SASA, Act 84 of 1996). This empowers the School Governing Bodies (SGBs) to develop a constitution with sub-policies that may be used to lead the school and govern it to achieve the educational objectives as set by the National Department of Education. The financial matters, buildings and grounds, admission language and religious matters of the school are the sole responsibilities of the SGB. In South Africa, governmental mix is among the strategies of policy delivery in education. Delivery of education policy is shared among three levels, namely, national, provincial and district levels. Provinces have decentralised power to districts and schools to enable them to make decisions and exercise more control of their work.

## 2.12.2  The sectoral mix

In the sectoral mix, services may comprise a mix between public and private responsibility and also between the voluntary sector and community agencies that may have a role in service delivery. It provides a mode of delivery that overcomes the problem of which particular level of government should be responsible. In the sectoral mix, we have public-private partnerships, the voluntary sector and the community (Rembe 2005).

## 2.12.3  The public-private partnership

Kouwenhoven (1993) identifies a number of policy areas where public-private partnerships have been established; namely, infrastructure developments, urban renewal, regional development, education and training and environment issues. One of the advantages that governments obtain from public-private partnerships is securing private sector finance and management expertise. On

the other hand, the private sector benefits from finance, infrastructure, good environment and other amenities that enable it to function smoothly and increase its profits. According to Parsons (1995:490), "public-private partnerships have been viewed by many people as ways of avoiding problems of top-down implementation in public policy".

### 2.12.4  The voluntary sector

Historically, the voluntary sector has been involved in welfare provision and other activities intended to uplift and empower the poor and needy (Butler and Wilson, 1990; Osborne and Gaebler 1992; Parsons, 1995). In most cases, religious organisations have established charitable institutions that have been among the major providers of social services as well as education. With the emergence of the welfare state and mass education, the voluntary sector was rendered less necessary. But in recent years, there has been a decrease in the role of the state providing directly a range of social and welfare services. Hence, the role of the voluntary sector in service delivery is increasingly becoming crucial (Peters and Wright 1996; Rockman, 1997). Voluntary organisations employ people on a permanent basis. They also have to make money and run on a sound financial basis (Osborne and Gaebler 1992:44).

In many cases, the voluntary sector enters into partnerships with public and private sectors in delivering services. Private sector finance may support activities of voluntary groups in association with the government. Alternatively, the government may choose to deliver via the voluntary sector and fund through grants or there may be a network of funding and support that facilitates an exchange of finance, expertise and commitment (Butler and Wilson 1990). Public agencies have become dependent on the voluntary sector to deliver services which they either find difficult to provide or they lack the resources to provide those services that have been traditionally provided by the voluntary sector. Contracting out or outsourcing to NGOs and individual consultants, often through a tendering process, has been among the common strategies of partnerships in policy delivery. Contracting out is said to enhance cost efficiency and the agents are appraised on this basis (Pampallis 2004; Rockman 1997; Lindblom and Woodhouse 1993). Outsourcing has been a common practice in education in South Africa, particularly in the provinces and districts where there is lack of capacity, e.g. the appointment of educators from Zimbabwe to assist in the teaching of Mathematics and Physical Science in South Africa.

### 2.12.5  The community

The community is another component of sectoral delivery mix. Since the 1980s community-based public policy strategies have been prominent in approaches to local policymaking and implementation. Glen (1993:217) defines community as "groups who share a location or physical space or who have common interests, traits or characteristics". He sees community policy as being "territorial or non-territorial and may be directed at a neighbourhood or a part of a town, or it may be directed at a group of people who share a problem or an interest" (Glen 1993:220). He identifies forms of community policy as: community development which is intended to empower the community to help itself with the aim of promoting a bottom–up approach where people are involved in defining their needs and goals; and community service that is geared at improving the relationship between the outputs of service providers and clients. This is intended to make services more responsive to the community's needs and increase their involvement in the way in which services are delivered. Community action is directed at problems of power and mobilisation of interests. It is intended to campaign for policies and interests of those that are marginalised and excluded from the political agenda.

It is evident from the above analysis that the process cannot be explained by using only one approach. This study integrated ideas, groups and networks and institutional approaches to examine the factors that have affected education policies, their formulation and implementation and the overall transformation of education in South Africa. The characteristics of quality education in public schools of Limpopo Province were identified. The extent to which leaders and managers influence the implementation of education policies were discussed. It contends that policy change and variation result from interaction of ideas and interests within patterns of group and policy networks and preset institutions. Managers from different institutions were observed and interviewed against the background of the literature reviewed in this chapter of the study.

## 2.13  LEADERSHIP IN THE EDUCATION SYSTEM

There is great interest in education leadership in the early part of the twenty-first century. Over the past years, the school leadership and management models have become a priority in

education policy agendas internationally. This is because of the widespread belief that the quality of leadership makes a significant difference to school and student outcomes. In many parts of the world, including South Africa, there is recognition that schools require effective leaders and managers if they are to provide the best possible education for their learners. As the global economy gathers pace, more governments are realising that their main assets are their people and that remaining, or becoming, competitive depends increasingly on the development of a highly skilled workforce. This requires trained and committed teachers but they, in turn; need the leadership of highly effective principals and the support of other senior and middle managers (Rembe 2005). Myles Munroe (2008:XVI) writes: "Nothing happens without leadership, nothing changes without leadership, nothing develops without leadership, nothing improves without leadership. The 'School That Works' Report, Commissioned by the Department of Education in 2008, confirms the importance of school leadership and its critical role in the achievement of excellence in education. A number of our schools that are working well display shared leadership qualities where principals create strong teams that plan and strategise together (Zuma 2009:3).

An organisation operates within the framework of leadership and follower relationships. Collins and Hanson (2011) argue that in great organisations the leader gets relationships right first and then deals with moral purpose. Fullan (2011) concurs that if you want to challenge someone to do better, you had better build a relationship first. He suggests that building relationships starts with leaders conveying respect before people have earned it and doing everything possible to create conditions that make people lovable (mainly by creating circumstances that favour success).

Leadership is a complex, intensely human phenomenon, driven by values, past personal experience, strong personal role models and identification with larger than life role models. The act of leadership emerges as a mixture of a way of being – as opposed to doing – and conscious role-playing behaviours. Sparg, Winberg and Pointer (1999:10) state that, although there is usually a relationship between management and leadership, not all managers lead and not all leaders manage. On the other hand, the leader focuses on people and inspires their trust because they are able to request him for help with their personal problems. This is because the leader has a long-range view and his/her eyes are on the horizon.

### 2.13.1 Definition of leadership

I defined and explained the leadership related  concepts in terms of the contingency theory of leadership. According to Barney (1985) in contingency theory of leadership, the success of the leader is a function of various contingencies in the form os subordinate, task, and /or group variables. The effectiveness of a given pattern of leader behavior is contingent upon the demands imposed by the situation. These theories stress using different styles of leadership appropriate to the needs created by different organizational situations. In this study, education managers leading and managing different educational institutions at different levels were evaluated as they lead in a variety of styled determined by their environments or situations. Their subordinates, task and group variables were different as informed by their political and socio-economic backgrounds.

Two contingency theories of leadership namely Fiedler's contingency theory and Hersey and Blanchard's situational theory were used in this study. Fiedler's approach depart from trait and behavioural models by asserting that group performance is contingent on the leaders's psychological orientation and on the contextual variables: group atmosphere, task structure and leaders power position (Harsey and Blanchard  1985). Hersey Blanchard situational theory is an extension of Blake and Mouton's Managerial Griod Model and Reddin's 3-D management style theory. These theories were incorporated in this study to guide on how the choice of leadership stylein a given situation can impact on the implementation of education policies with the aim of providing quality education at public schools in Limpopo province.

A large body of international research supports the view that school leadership can have a significant indirect impact on student learning outcomes (Leithwood *et al.*, 2006; Robinson, Lloyd and Rowe, 2008). In South Africa, Ngcobo and Tikly (2008) concur that school effectiveness and improvement depend on effective leadership. Hallinger and Heck's (2010) study that attempted to locate what forms of leadership practice contributes to sustained school improvement proved that some forms of distributed (collaborated) leadership have an impact on school effectiveness and improvement. It is based on trust and requires "letting go" by senior staff rather than just delegating tasks and "redistribution of power" (Grant, 2010:57). Williams (2011) further states that context-based factors result in people-based factors. This means that factors such as strict bureaucratic and hierarchical management practices in school can result in

the evolvement of people who develop certain attitudes in order to adapt and survive in such schooling contexts.

Maak and Pless (2006) see the roles and responsibilities of a responsible leader as those of being a servant to others, a steward and custodian of values and resources, an architect of systems and processes and moral infrastructure, a change agent as transformative leader, a coach who supports and nurtures followers, and lastly as a storyteller, creator and communicator of moral experiences who shares systems of meaning. Rossouw and Van Vuuren (2010) suggest that all actions are always ethically laden and can therefore impact positively or negatively on the interests of others. The people in an organisation, working together, determine the quality of each other's lives (Rossouw and Van Vuuren 2010)

### 2.13.2  Categories of leadership roles

There are many categories of leadership in different organisations and institutions. According to Kisse and Russell (2008:24), leadership roles categorised by type of preferences are: interactive leader (extraversion), elective leader (introversion), administrative leader (sensing), visionary leader (intuition), systemic instructional leader (thinking), community instructional leader (feeling), planful leader (judging) and flexible leader (perceiving). The knowledge of the leadership roles assisted me to understand the effectiveness of the implementation of education policies by education managers at public institutions.

### 2.13.3  Leadership styles

Different leadership styles exist in different levels of government and institutions. I focused on those that are relevant to the study. Strong political leadership at the highest (national or provincial) level plays an important role in successful policy implementation, especially when the policy originates from current policies (Fredriksen 2007:15). Hayward (2008:12) identified six types of leadership style that he believes underpin quality in leadership at schools. These six leadership styles are assertive leadership, breakthrough or maverick leadership, emotionally intelligent leadership, ethical leadership, invitational leadership, servant leadership.

One of the commonly applied leadership styles in developing and fast-changing countries is transformational leadership. Nguni (2006:148) asserts that transformational leaders motivate followers to do more than what was originally expected of them. Leithwood and Jantzi (2006:204) argue that transformational leadership practices on the part of those in positions of responsibility have both direct and indirect effects on educators; motivation, capacity and work settings. According to Leithwood and Jantzi (2006:205), the following elements are critical in transformational school leadership: building school vision through developing specific goals and priorities, holding high performance expectations and creating the structures to foster participation in school decisions.

The essence of transformational school leadership is dedication to fostering the growth of organisational members and enhancing their commitment (Gray and Ross 2006:180). Leithwood and Jantzi (2006:2005) state that included in transformational leadership is building the school vision, developing specific goals and priorities and holding high performance expectations. To be able to achieve the goals and the objectives of the organisation, thorough planning by the school leader and other role players is needed. According to Nuku (2007:44), a vision is the shared image of the fundamental purpose of the school and embraces the hopes and aspirations of the school. There are narrow and broad conceptions of instructional leadership behaviour. In the broad view, instructional leadership entails all the leadership activities that affect student learning. (Sheppard 1996). The narrow definition focuses on those actions that are directly related to teaching and learning, observable behaviours such as classroom supervision, where the latter also involves variables such as school culture which may have important consequences for leadership that focuses on teaching and learning and on the beviour of teachers in working with students.

Apart from transformational leadership discussed above, scholars like Duncan and Scroope, (2008) and Spillane, Diamond, Sherer and Coldren (2005) advocate "shared leadership" or simply "collaborated leadership". According to Darren (2010:63) this approach reflects the move away from a heroic model of leadership to a leadership approach that potentially unlocks the capabilities and talents of individuals. It also describes a group or team of people working together towards an agreed objective (Spillane *et al.*, 2005). According to Cole (2006) and

Williams (2011), some of the factors that inhibit collaborated or shared leadership and are relevant in the context of this research are the authoritarian ethos of school principals, cultural and gender biases, teams meeting infrequently, and teachers' reluctance to participate in leadership roles.

## 2.14 MANAGEMENT IN EDUCATION

The beginning of management activities goes back to the very beginning of humankind. Concepts such as leadership and management are interrelated but are not synonymous. Broad knowledge of these terms may contribute to excellence in leadership and management of educational institutions. Explicit knowledge exists in the form of words, sentences, documents, organised data, computer programmes and in other explicit forms (King 2009). Therefore, I consulted a number of literature sources that define and explain the meaning and characteristics of leadership and management.

Since 1994 the democratic government has initiated a number of programmes in consultation with key stakeholders from political, labour, business and academic sectors to reform the public service sector of South Africa. These reforms were inevitable in the country because South Africa belongs to the globalised society in which complex variables compel all nations to participate (Thornhill 2007:676). Education reform in South Africa is greatly influenced by globalisation, socio-economics, politics and history (Wallance 2006; Brown and Duku 2008; Swanepoel 2008; Mncube 2008, 2009). Against this global background, the restructuring of education in South Africa has to contribute to the formation of a just and equitable society (Swanepoel 2009). Education and training initiatives should produce learners who can critically respond to global economic demands (Lombard and Grosser 2008).

### 2.14.1 Definition of education management versus leadership

According to Bush (2008:8-9) education management and leadership are fields of the study and practice concerned with the operation of schools and other educational organisations and increasingly regarded as essential if schools are to be successful and are to achieve wide-ranging objectives set for them by their many stakeholders, the governments which provide most of the funding for public educational institutions, as well as themselves.

Education management is defined as the act of getting school communities together to accomplish the desired goals and objectives using the available resources efficiently and effectively (Mncube 2009:29).

According to Robbins, Judge, Odendaal and Roodt (2009) and Williams (2011), managers had to perform five managerial functions to ensure success: planning, organising, coordinating, controlling and commanding. Distinctions can be made between senior management, middle management and junior management. Senior managers are usually managers functioning at executive management and board level in organisations. Middle managers are responsible for the execution of the action list set by senior management towards obtaining organisational goals and objectives. Junior management reports to middle managers and function more on team leaders or supervisory level (Scherhorn 2004; Williams 2011).

Participative management is also at the heart of Bush's (2003) collegial model of management. According to Bush and Glover (2003:64), "collegial models include all those theories which emphasize that power and decision-making should be shared among some or all members of the organization". According to Gulting (1999:6), principals as managers need a wide variety of competences to mobilise and use resources efficiently and to achieve the larger task of managing the school to improve the quality of teaching and learning. This is supported by Clarke (2009:39), who points out that one of the sole responsibilities of the school manager is to manage human resources, which must include educators, learners and parents. School managers' management role has been extended to the management of learners in general. Management function areas,

The management functions of managers may vary from one institution to another. Van Rooyen and Rossouw (2007:19) categorise four management areas, namely human resource management, curriculum management, financial management and managing facilities. However, classical management theorists define the roles of management in terms of planning, organising, commanding, coordinating and controlling (Bratton, Grint and Nelson 2005:7). Loock (2003:67) identifies management functions which include assisting subordinates with problems, giving information to employees, receiving information from employees, managing labour relations, leadership employee development, employee utilisation, planning, scheduling and organising;

controlling work progress; upraising performance; resource utilisation; administration; disciplinary actions and personnel management.

### 2.14.2 Management of change

In the post-apartheid South Africa, new policies have been developed to bring about changes in the education system. Change is defined by Hughes (2008:2) as new ways of organising and work arrangements involving relationships, understandings and processes in which people are employed. Change management is viewed by Hughes (2008:2) as a means of attending to the organisational change transition processes at organisational, group and individual levels. The process of change is complex and requires thorough planning by all the relevant stakeholders in order to reach prescribed goals of the desired change (Hughes 2008:2). Management of change is seen by Harris (2004:391) as an emotional process and it seeks to provide an account of the emotions of change experienced at one school. It examines complexity of change and explores the emotional experience of staff involved in a development project.

The management of change requires strategic planning for the effective implementation of such change. Gulting *et al* (1999:4) state that change implementation is characterised by ongoing processes, well developed conceptual skills, focus on the school as a whole, is future-oriented, is concerned with the school's vision, mission, objectives and strategies, aims at integrating all management function, focuses on opportunities (or threats) that can be exploited (or dealt with) through the application of the school's resources.

Succesful change management may be attained by implementing Kotter's 8-Step Process for Leading Change which can be achieved by creating climate for change; increasing urgency; guiding team; getting the right vision; engaging and enabling the organisation; communicate for buy-in; empower action and ceate short term wins. (Kotter 2012)

### 2.14.3 Management models in education

Different departments may adopt different approaches in the management of their daily activities. According to Rembe (2005), management consists of those activities that secure, direct, and energise people and resources for the realisation of common values. There are various

ways to carry out these activities. The modern model involves a top-down multi-level management structure. While primarily designed for other sectors (notably the military and the capitalist manufacturing sector), this model has been widely adopted in the developing world for the delivery of education. In the educational sector, the top-down multi-level management model's objectives can be characterised as follows: management arranges for the construction of schools in as many locations as is feasible; central management designs the inputs for these schools with particular stress non a centralised, integrated, and highly nationalistic curriculum; and the provision of teachers who believe in the main tenets of this curriculum; management delivers inputs to the schools; management establishes a system of top-down supervision in an effort to insure that the inputs are correctly deployed according to central guidelines.

I discussed five education management models as advocated by Bush (1995:20) below.

### *Democratic models*

These models have highly educated staff. They all participate in decision-making and they agree unanimously on the organisation's objectives. Decisions are made by consensus or compromise and not by voting. In theory, authority is shared between the various participants in the decision-making process. According to UNISA (2007:86), effective leaders grow in the area of self-correction and therefore seek feedback from their peers and their followers. Leaders who pursue these management models make effective managers who promote initiative and creativity amongst the staff members.

### *Formal models*

The formal models function as a system. There are clear objectives that are pursued and there are clear boundaries between people's functions. There is also bureaucracy. Decision making is downward (top-down). Emphasis is on the organisation. Leaders who pursue these management models are task-oriented. According to Love (1994:37), task-oriented leaders want to get the job done and will emphasise activities like planning, directing and problem solving. Leaders following these management models yield good performance.

### *Political models*

These management models put more emphasis on factors such as influence, which has more to do with informal authority and is usually exercised by subordinates and on upward decision making. These models are descriptive rather than prescriptive. In an organisation with these models, there are no clear objectives to be pursued by everyone. The objectives differ from group to group. Bargain and negotiation are dominant decision-making activities. Managers in these organisations strive to gain their followers' approval.

### Subjective models

These models are about the subjective perceptions of individuals in the organisation. Emphasis here is on the individual and his/her place in the organisation. The organisation is not a separate entity and does not have an objective structure. Managers who use these models lay down rules and the individuals all interpret events in order to vest them with their own meanings.

### Conflicting models

These models relate to theories that stress uncertainty, unpredictability, instability and complexity in organisations. Inconsistencies are identified in respect of aims, authority and technology and the effect and role of the environment. School managers (principals) who follow these models have vague objectives that are not always easily quantifiable. They also have a wide range of objectives that are informed by their unique value system. The different role players have different personal objectives. These management models are of a value in education management because they are prescriptive, descriptive and explanatory, and they bring about improvement of practice in education.

In this study I focused on the advantages and limitations of each management model as applied by the school manager in the implementation of education policies. The level of improvement in the education system brought about by the practice of each model will be discussed in terms of the role of each stakeholder in education.

## 2.15  QUALITY EDUCATION IN SOUTH AFRICA

According to Starida (1995:115) and Smuts (2002:23) the meaning of the term quality is best conveyed by the Greek word *peoteta,* which was used by Plato and Aristotle to single out certain characteristics that were considered to be distinctive of a thing- distinguishing it from other types. The term is also related to specific attributes of people- usually 'good qualities'. Within this framework, quality becomes a multi-value concept depending on the situation (different definitions of quality in different historical and social contexts) and a multi-level concept involving different frames of reference in which it can be analysed. However, instead of trying to identify the essence of quality, it would be more appropriate to define the term as a means to attain set aims. Rooyen (2011:213) defines education as the integration of new knowledge, the associated skills and related value systems enabling the learner to apply it in real situations.

Ncube (2004:17) views quality in education as an evaluation of the processes of education which enhance the need to achieve and develop the talents of customers of the process, and at the same time meets the accountability standards set by the clients who pay for the process or the outputs from the process of educating. These quality deliverables require continuous assessment and monitoring through the implementation of quality assurance practices. According to Jomtien (1990) a quality education is one that provides learners with basic learning tools and basic learning content required by all human beings to be able to survive, to develop their full capabilities, to live and work in dignity, to participate fully in development, to improve the quality of their lives, to live together in peace, to make informed decisions and to continue learning. It encompasses the framework for understanding and achieving quality education established for dimensions in which it occurs and can be measured: (1) learner characteristics (2) learning processes (3) content and (4) systems.

Therefore, the quality of the education is passed on in the value that the school leaver adds to the community. The South Africans Schools Act (Act 84 of 1996) refers to the quality of education on four occasions. Firstly the preamble of SASA expresses the intention that a new national system for schools will provide an education of progressively high quality for all learners and in so doing lay a strong foundation for the development of all our people's talents and capabilities. Secondly, SASA stipulates in Section (8)2 that the code of conduct for learners must be aimed at

establishing a disciplined and purposeful school environment, dedicated to the improvement and maintenance of the quality of the learning process. Thirdly, the first function of the school governing body, as contained in Section 20(1a) of SASA, is to promote the best interest of the school and strive to ensure its development through the provision of quality education for all learners at the school.

The quality dimensions specific for education were found from the literature review and a new framework with corresponding characteristics was developed. The 70 attributes identified are grouped into five dimensions: organisation and governance, financial resources, physical resources, teaching-learning process, supplementary process (Singh and Lokotsch 2008:164). The quality of education rests on the quality of teaching and learning that must take place in a school as an organisation. Quality teaching and learning can best be described by performance outcomes in the classroom environment. Karimi (2008:25) states that performance is observed by the direct outcome of learning and it is the main indicator that learning has occurred. Karimi (2008:25) describe learning as a "persisting change in performance or performance potential that results from experience and interaction with the world". Therefore, for learning to be observed, there must be demonstration through the performance on related tasks. Though performance heavily depends on learning, low performance may not necessarily reflect inadequacy in learning. Karimi (2008:65) further stipulates that the quality of teaching and the attitude of educators also influence the students in their choices of approaches to learning. Finally, when referring to the obligation of the governing body of the public school to supplement the resources supplied by the State in Section 36 (1) of SASA, the purpose is therefore stated as " to improve quality education provided by the school to all learners at the school (Rooyen 2011:213).

According to Rembe (2005) there is widespread recognition of the need of systems to recognise indicators of quality beyond traditional data collection on enrolment, attendance and attainment. This would include, for example, methods for the ongoing formative assessment of basic knowledge and skills acquisition as well as life skills, behaviours and attitudes. Assessment of quality education at the level of learning should also incorporate methods that encourage learners, parents and other community member to reflect on the processes, environment and

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content of learning and to become active participants with teachers and managers in improving the quality of the programme or school (Rembe, 2005).

In an attempt to assess the quality of education in South Africa, the indicators such as PIRLS, TIMSS, PISA, SACMEQ and ANA tests were administered, which focus primarily on the student's ability in language, mathematics and science in the entire country (Rooyen 2011:214). It was eveident that learners in grade 3 and 6 cannot read and numerate at an expected level.

### 2.15.1 Quality education learning goals

According to UNESCO (2005) the following goals have been set for 2015:

**Learning Goals**

Learning Goals for global citizens

I. **Knowledge**
1. Knowledge of world geography, conditions, issues and events.
2. Awareness of the complexity and interdependency of world events and issues.
3. Understanding of historical forces that have shaped the current world system.
4. Knowledge of one's own culture and history.
5. Knowledge of effective communication, including knowledge of a foreign language, intercultural communication concepts, and international business etiquette.
6. Understanding of the diversity found in the world in terms of values, beliefs, ideas, and world views.

II. **Attitudes**
1. Openness to learning and a positive orientation to new opportunities, ideas, and ways of thinking.
2. Tolerance for ambiguity and unfamiliarity.
3. Sensitivity and respect for personal and cultural differences.
4. Empathy or the ability to take multiple perspectives.

5. Self-awareness and self-esteem about one's own identity and culture.

**III. Skills**

1. Technical skills to enhance the ability of students to learn about the world (i.e. research skills).
2. Critical and comparative thinking skills, including the ability to think creatively and integrate knowledge, rather than uncritical acceptance of knowledge.
3. Communication skills, including the ability to use another language effectively and interact with people from other cultures.
4. Coping and resiliency skills in unfamiliar and challenging situations.

## 2.15.2 International views on the global provision of quality education

Improving the quality of education for all learners everywhere is a key priority if we are to reach goals of Education for All. Without quality, access to and equity in education cannot be fully achieved or sustained. Although huge gains have been made in the numbers of children enrolled in school, there is growing recognition that quality is the main determining factor in whether learners in school succeed in learning. The decline in student performance on international and regional student assessments on learning outcomes in many countries has also drawn increased attention to the quality issue. Furthermore, the evidence points to growing inequalities between the average scores of learners from economically privileged background and those of learners living in poorer areas. The situation is exacerbated in EFA-Fast Track Initiative countries, where emphasis on the rapid expansion of access has led to teacher shortages, overly crowded classrooms, shortage of teaching and learning materials and the overall deterioration in learning environment *(EFA Global Monitoring Report, 2008)*

The criteria against which South African Education can be judged are the evaluation on the attainment of international goals as framework of standards set for all countries in provision of quality education.

## 2.16  CONCLUSION

The theoretical framework on education policies and the historical background of the South African education system constituted the basis from which I conducted policy implementation analysis. The role of education stakeholders in the implementation of policies, factors that may have an impact on policy implementation as well as the challenges facing education managers at various levels were discussed. A brief summary of each education policy was provided. The next chapter will focus on the research design and methodology that was used in data collection on policy implementation. The qualitative research design, coupled with the epistemological and ontology perspectives, will be discussed. The qualitative research approach, its features, advantages and disadvantages, will be outlined. In addition, the sampling, choice of data collection instruments such as observation, interviews and document analysis will be discussed, along with the concept of the trustworthiness of research as well as the research ethics in broader perspective.

# CHAPTER THREE:
# RESEARCH DESIGN AND METHODOLOGY

## 2.17  INTRODUCTION

In this chapter, I introduced the concepts paradigm, epistemology and ontology at the centre of qualitative research methodology used in the research project. The rationale for the selection of the sample, the data collection techniques, data analysis process and research ethics will also be provided. According to Rossouw (2010:89), in research design, decisions must be made that include answers to questions like the following: Which method or combination of methods is appropriate? How will the data be arranged and structured? In what way will the data be interpreted? How will the results of the research be presented and which style of presentation will be used? McMillan and Schumacher (2012:8) contend that research design describes the procedures on how to conduct research including "when, from whom and under what conditions the data will be obtained", Mpya (2007:49) argues that research design also indicates how the research is set up, describing the methods to use to collect data and the procedure in general for conducting the study.

The qualitative research paradigm was chosen for this study because of its heuristic value and its usefulness as a tool for exploration related to knowledge development. It is used to determine current problems in practice and to identify what others did in similar situations (Burns and Grove 2003:737). This research project was situated within the interpretive research paradigm with its emphasis on experience and interpretation (Henning, Van Rensburg and Smit 2004; Smit 2003). Interpretive research is fundamentally concerned with meaning and it seeks to understand social members' definitions and understanding of situations. The interpretive paradigm does not concern itself with the search for broadly applicable laws and rules, but rather seeks to produce descriptive analysis that emphasises deep, interpretive understanding of social phenomena. The interpretive researcher looks for the frames that shape the meaning. It thus holds that researchers in this paradigm are extremely sensitive to the role of context (Henning, Van Rensburg and Smit2004). Knowledge about the development of education policies, the factors affecting the implementation of education policies as well as the challenges that exist in the education system that may hamper the effective leadership and management of quality education in public schools could feature well in this qualitative study.

The main research question and sub-research questions were the centre of the data collection process, and were stated as follows: ***How do education managers in Limpopo Province interpret and implement the selected education policies for the provisioning of quality education in public schools?"*** The sub-research questions were: *What knowledge or interpretations of educational policies do school leaders and managers have? Why do school managers have such interpretations of these education policies? What view of leadership and management role is held by education managers about the implementation of education policies? What roles should the provincial, district, circuit and school managers play in the implementation of education policies in public schools?*

I applied the epistemological view of knowledge (how knowledge is acquired) and an ontological view of reality (how reality is perceived) that are crucial positions in any research inquiry. The Stanford dictionary of philosophy (2009) explains that 'epistemology is about issues having to do with the creation and dissemination of knowledge in particular areas of inquiry'. The ontological and epistemological perspectives that inform this approach have been contested

(Giroux 1981; Lemesianou and Grinberg 2006; Hyslop-Margison and Naseem 2008). The logical positivist epistemology, and the form of research methodology which it generates, has defined limitations. At a personal level, understanding the relationship between my view of reality (ontology) and the meaning I ascribe to knowledge and its creation (epistemology) was fundamental in being able to articulate the rationale for my research design and methodology.

Epistemology was used in conjunction with ontology (how and why practical). Ontology is constituted by how we think about and understand a phenomenon and the nature of its reality. Whereas epistemology is constituted by the way we look at the phenomena, methodology describes the approaches we use in search of that knowledge (Denzin and Lincoln 2002). The way in which knowledge is developed and generated in a setting is where epistemological and ontological assumptions are further understood. There is a significant relationship between the epistemological, which is the constitution of knowledge, and methodological dimensions. Reality is regarded as being 'out there' and measurable. This research is premised on the assumption that subjectivity cannot be divorced from the process of inquiry (Leedy and Ormrod 2005). This research project therefore shares the opinions of Morris (2006:131) and Blake *et al.* (2003) that the participants' views are important and should be taken into consideration.

From an ontological perspective, there are diversified realities, and this diversification ascertains each individual's perceptions of reality. People encounter a diversity of interpretations about the world, because human reality is mutually and socially constructed and presented (Willig 2001:13). Since each individual perceives reality from a constellation of different viewpoints, it is evident that no two people will perceive the world in the same way (Williamson 2006).

The researcher should choose the research methodology relevant to the phenomenon under study. According to Boeije (2010:11) the purpose of the qualitative approach is to describe and understand social phenomena in terms of the meaning people bring to them. He further stipulates that qualitative research questions are studied through flexible methods enabling contact with participants to an extent that is necessary to grasp what is going on in the field. It is therefore argued that a qualitative research design was relevant to explore meanings in the complex context of this study because of its flexibility. Therefore, this research adopted the qualitative research paradigm with a bias towards the phenomenological approach. Qualitative research

places emphasis on natural settings rather than laboratories and fosters pragmatism in using multiple methods for exploring a topic (Marshall and Rossman 2006). At the same time, a phenomenological study describes the meaning for several individuals of their lived experiences of a concept or phenomenon (Creswell 2007:2).

I chose the qualitative research approach, which is viewed by Merriam and Associates (2007:xv) as a "quest" for the understanding of a phenomenon from the participant's perspective as he or she makes meaning of his or her world. Words and human experiences are the foundations of the knowledge and understanding that qualitative research seeks to gather (Merriam and Associates 2007:5). A qualitative research strategy was the suitable approach because the study was conducted in a natural setting of social sectors, the educational institutions (Neutens and Rubinson 2010:319). Qualitative research is also highly suited for research on vulnerable groups, like school managers and educators because the tradition and techniques of qualitative research offer such groups a unique "voice" to be heard (Liamputtong and Ezzy 2005). According to Leedy and Ormrod (2010:12), a qualitative approach enables the researcher to find out rich descriptions that are vivid, and nested in a real-life context. Qualitative research is an approach that seeks to describe and analyse culture and behaviour of humans and their groups from the point of view of the people being studied. Its emphasis is on providing a comprehensive and holistic understanding of the social setting in which the research is conducted, as described by Burns and Grove (2003:247). A qualitative perspective allowed the exploration of critical non-quantifiable data from narratives of participants on education managers entrusted with the responsibilities of policy implementation (Theodoros and Theodoros 2005). The experiences of education managers and impact of policy implementation in public schools can best be described by words rather than quantitatively. Hence their feelings and perceptions about education policies were shared and meaning was constructed in the context of the real world in which they work.

Each qualitative strategy is particularly suited for obtaining a specific type of data (Ary *et al* 2006:474). I therefore chose a qualitative research design that is flexible, modifiable, mouldable, and reflexive (Maxwell2005:2; Bogdan and Biklen 2007:54-55). I was able to describe and understand the phenomenon from the perspective of the participants (Leedy and Ormrod 2004).

The qualitative research approach uses an inductive method to interpret and analyse the data to obtain common themes (McNiff 2006). The qualitative researcher endeavours to obtain an in-depth understanding and definition of the problem or phenomenon that is presented by the participants. I therefore went to the sites where the events naturally occur. The qualitative technique for data collection comprises of words rather than numbers and therefore allows the researcher to retrieve an in-depth description of the observed phenomenon (McMillan and Schumacher 2006).

Through the qualitative research approach, the descriptive data allows patterns, themes and holistic features to dominate (Johnson and Christensen, 2012). Consequently, the qualitative study was specifically used to determine the participants' conceptualisation of education policies. Moreover, the qualitative researcher endeavours to learn more about the phenomenon and come up with new hypotheses and theories (Johnson and Christensen 2012). There is a greater use of words, images and categories than with numbers, statics or numerical analysis. A qualitative research project is a more empathetic and explorative approach and examines the breadth, length and depth of the phenomena (Johnson and Christensen 2012). The choice of Limpopo Provinceas the setting of the participants was also purposive. Ultimately, the purpose of the qualitative study tests the general viewpoint and perceptions that the literature study purports to be in a given phenomenon for the study (Johnson and Christensen 2012). As a researcher, my ontological position (the way I perceive the world) and my epistemological position (knowledge) had direct influence on the data collected.

The qualitative paradigm has several characteristics (Kruger 2010:52; Maritz and Visagie 2010:9). The characteristics of the qualitative paradigm used in this study are the researcher as an instrument, unknown variables, holistic emergent methods, iterative, triangulation and ethical considerations. The qualitative research method requires the researcher to become the research instrument (Maritz and Visagie 2010:9). The researcher also has an ethical obligation to observe behaviour. As the researcher, I was a participant observer, conducted focus-group interviews and in-depth individual interviews in the collection of empirical data.

I collected data based on both the theoretical and epistemological perspectives. Denscombe (2007:89) indicates that theoretical approach is paramount when there is a need to link any

explanation very closely to what happens in a practical situation, namely the real world. I entered the field with sufficient experience and knowledge about certain conditions of education management, but I did not allow this knowledge to interfere with my objectivity. I approached the research field with an open-minded approach. As Denscombe (2007:303) suggests, the researcher needs to be selective in what was presented by prioritising certain aspects over others.

## 2.18  STEPS IN CONDUCTING THE QUALITATIVE RESEARCH

I followed six steps that are generally followed when conducting qualitative research as outlined by Slavin (2007):

- Identifying what to be studied: I chose a topic under my field of work as school manager and wrote a letter to Limpop province department of education seeking permission to conduct a scientific research within the area of their jurisidiction.
- Identfying whom to study: The selection of  sample, writing of consent letters, indicating the purpose of the study, lenth of the interview sessions, type of observation schedules were done.
- Collection of data: Data collection were done in a period of three month. The interviews were tape-recorded and field notes taken during observation. Documents were consulted and analysed based on the title of the research.
- Analysis of data: Data were presented in three catergories based on data collection instruments used. Qualitative data content analysis process was followed and data transcribed, code, analysed and interpreted'
- Generations of findings: Findings or results were generated from data collected and then discussed in chapter 4.
- Making data presentation and conclusions: Presentation of research findings were given, conclusions  were drawn and recommendations were made on the implementation of education for effective leadership and management of quality education at public schools.

## 2.19 METHODS AND PROCEDURES FOR DATA COLLECTION

Authors writing about the qualitative research approach define it in various ways. Flick (2007:ix) defines qualitative research as research that is intended to approach the world out there and to understand, describe, and sometimes explain social phenomena from the inside in different ways by analysing experiences of groups or individuals, analysing interactions and communications or analysing documents (texts, images, films or music)". Litchman (2010:12) states that qualitative studies provide in-depth descriptions and are aimed at understanding human experiences. The author believes that the purpose of a qualitative study is to "describe, interpret and understand human phenomena, human interaction and human discourse". Litchman (2010:120 adds that the researcher acts as the key instrument during the data-gathering process and becomes part of the world that is being studied. Litchman (2010:12) mentions that qualitative research tends to be "fluid and ever changing". Cresswell (2005:48) mentions that qualitative researchers usually make use of broad general questions that the participants can answer and these questions often change or emerge from the collected data.

The researcher purposively samples participants and administers observation and interviews for data collection. Hence, smaller but focused samples are more often needed than large samples (Yıldırım and Şimşek 2008). Maree (2010:50) describes qualitative research as research that attemps to collect rich descriptive data in respect of a particular phenomenon or context with the intention of developing an understanding of what is being observed or studied. It therefore focuses on how individuals and groups view and understand the world and construct meaning out of their experiences. Therefore, I constructed meanings from my interaction with participants.

According to Litchman (2010:15) qualitative researchers prefer to collect data in natural settings and they often make use of observation (in classrooms, in homes or at schools) and sometimes also conduct interviews at the workplace of the interviewee or by phone. Litchman (2010:15) mentions that a qualitative study usually makes use of purposive or opportunistic sampling. Cresswell (2005:48) mentions that qualitative researchers mostly rely on field notes, transcriptions and diaries or journals to reflect on data for analyses purposes. The author adds that data analysis consists of text analysis and transcripts of interviews, as well as written notes from observations and documents.

## 2.20 SAMPLING

I defined the concepts of population, sample and sampling with the aim of deriving a link tht exist amongts them. Singleton and Straits (2010:155) describe defining a population as a two-step process. First the researcher must clearly identify the target population, which is the population to which the researcher would like to generalise his/her results. To define the target population, the researcher must specify the criteria for determining which cases are included in the population and which cases are excluded. The researcher must make the target population operational. Creswell (2008) asserts that people or sites that can best help in understanding a researched phenomenon should be selected. Budhal (2000) adds that site selection and sampling processes are used to identify cases that the researcher is going to study. According to McMillan and Schumacher (2010) choosing a site is a negotiated process to obtain freedom of access to a site that is suitable for the research problems and accessible for the researcher in terms of time, mobility, skills and resources. This meant that the researcher had to obtain information in advance about the sites, their suitability, history, routines and social systems.

 Monareng 2009:124) defines sampling as a process of selecting a group of people, events, behaviours or other elements with which to conduct a study where the research population cannot be managed due to its size. In qualitative research the way the sample is designed and sample size chosen, depends on the aims of the researcher (Polit and Beck (2004:765) share the same view in defining a sample as a small portion of the total population or set of objects, events or person that comprises the subject to be studied.

For this study, I chose purposive sampling procedures. Merriam (2009) explains that "purposeful sampling" is based on the assumption that the investigator wants to discover, understand, and gain insight and therefore must select a sample from which the most can be learnt Creswell (2008:214) states that in purposive sampling, researchers intentionally select individuals. So purposive sampling involves the application of specific set of criteria for selecting a research sample (Merriam 2009:77). Rossouw (2010: 113) states that, in purposive sampling, the sample is selected on the grounds of the existing knowledge of the population

With purposeful sampling the most productive sample is selected in order to answer the research question by developing a framework of variables to guide the selection. The researcher needs to

look at selecting participants that will meet the actual purpose of the study, bearing in mind the cost and time constraints (Johnson and Christensen 2012). According to Mack, Woodsong, MacQueen, Guest and Namey (2005:4), purposive sample sizes are often determined on the basis of theoretical saturation (the point in data collection when new data no longer brings additional insight to the research question).

For the purpose of this study, the specific phenomenon which was investigated is the implementation of policies for effective leadership and management of quality education in public schools. The population therefore consisted of educators, school managers, circuit managers, curriculum managers, governance managers, human resource managers, finance managers, labour relations managers and educator union representatives. They were selected purposefully because of the knowledge and experience they have in the phenomenon under investigation, namely the implementation of policies for effective leadership and management of quality education in public schools. I systematically selected the sample according to a specifically controlled condition (Johnson and Christensen 2012). The data sampling procedure for this research was not randomly selected. The respondents were identified because of specific attributes within their occupational positions. In other words, the identified respondents or participants were chosen because they were likely to be knowledgeable and informative about the specific phenomenon I wished to investigate. Purposive sampling was therefore appropriate for the research problem for this study. I needed to look at selecting participants that would meet the actual purpose of the study within the cost and time constraints (Johnson and Christensen 2012). It was not feasible to include all education managers in Limpopo Province. I used purposive sampling to access in-depth knowledge on the specific, unique issue of education policies from politicians, educators, school managers, circuit managers, district managers and educator union representatives who were identified because of specific attributes within their occupational positions. In other words, the identified respondents or participants were chosen because they were likely to be knowledgeable and informative about the specific phenomenon I wished to investigate by virtue of their professional role and experience (Cohen, Manion and Morrison 2011:157).

## 2.21  DATA COLLECTION TECHNIQUES

Data collection reflects the frequency of types of behaviour, and/or words in the form of responses, opinions or quotes. According to Creswell (2008:10), data collection means identifying and selecting individuals for a study, obtaining their permission to study them and gathering information by asking people questions or by observing their behaviour. In qualitative research, the researcher becomes the primary research instrument.

Qualitative research depends on multi-method strategies to collect and corroborate data. Hence, in this study, interviews, document analysis and observations were primary data collection techniques. Qualitative research is interactive face-to-face research, which requires relatively extensive time to systematically observe, interview and record processes as they occur naturally (Ary *et al* 2006:474). Three data collection techniques I used in this study will be discussed below.

### 2.21.1  Observations

As the researcher, I was a participant observer in this study. Hennink (2011:179) states that observation is a process of learning through exposure to or involvement in the activities of the participants in the research setting. It enables the researcher to observe and record people's behaviours, actions and interactions systematically. Observation is a way of generating empirical material in "naturally occurring settings" as a passive or participant observer. I conducted participatory observation in my interaction with the participants, because it enabled me to obtain detailed descriptions of the social settings and events in order to situate the participants' behaviours within their own socio-cultural context. It enabled me to see directly what people were doing without having to rely on what they said they did; to see things that would possibly escape the awareness of people in the setting. It provided information on things people would possibly otherwise be unwilling to talk about. The most objective of observation is to study people in their habitat or natural setting in order to understand the dynamics of the researched phenomenon.

I adopted qualitative participant observations as a research instrument because of the importance of the social setting and my interest in finding out more about what happens in it. A number of advantages of qualitative observations cited by Patton (2002:262-264) prompted me to use it as a tool in gathering qualitative data. Firstly, direct observations enabled me to understand and capture the context within which people interact. Secondly, participant observations provided me with first-hand experience of a setting and this permits the researcher to be open, discovery-oriented and inductive because the researcher does not have to depend on prior conceptualisation of the setting. Getting close to the people in a setting through first-hand experience allowed me to draw on personal knowledge during the formal analysis. Observational fieldwork gave me the opportunity to see things that may routinely escape awareness among people in the setting. Direct observations also gave the me the chance to learn things that participants would otherwise be reluctant to talk about in an interview due to their sensitivity. According to Sheppard (2004:209), observation enables the researcher to have a 'direct line' with the processes and outcomes of an intervention. Thirdly, participant observations enable knowledge or evidence of the social world to be generated by observing, or participating in or experiencing "natural or real" lifesettings or interactive situations. The assumption behind the adoption of observations was that meaningful knowledge would be generated by observing phenomena since not all knowledge can be articulable, recountable, or constructible in an interview.

As participant observer, the researcher should observe and record data. Therefore the researcher must acquire the necessary knowledge and skills for data collection. Observation requires skills not only in observing social situations, but also in recording your observations (Hennink, 2011:194). I was fully immersed in the social and professional context of the research study as a school manager who is directly involved in education policy implementation and interacts with managers at circuit, district and provincial levels through circulars and face-to-face encounters.

Lichtman (2010:168) mentions that conducting an observation consists of two phases, namely the planning phase and the conducting phase. During the planning phase, the researcher has to decide what to observe and identify three to five areas to look at. Then he/she has to decide how they will record their observations and how much time they will spend doing the observation. During the conducting phase, the researcher has to settle in at the designation, study his/her

surroundings, and then focus on what has to be observed. Gay and Airasian (2003:203) suggest that the researcher make use of an observation protocol during the observation session, since this will assist the researcher in maintaining his/her focus and it provides a framework for the field notes. It can be help to ensure that data is recorded in an organised fashion. I minimised the above-mentioned challenges by taking key notes of information relevant to the research study. The notes on the observation sheets were summarised in themes and sub-themes. I kept a detailed and accurate record of the field notes, which included all the activities, conversations and decisions (Cohen Manion and Morrison 2007).

### 2.21.2 Interviews

Numerous authors have defined what an interview is. Some have common views whereas others have opposing views. According to Ary *et al* (2006:480), an interview is a direct method of collecting information in a one-to-one situation and an interchange of views between two or more people on a topic of mutual interest. The interchange is between the participant who has experiences and the researcher who wants to know the experience in order to provide answers to a research question. According to Kumar (2011:145), an interview schedule is a "written list of questions, open ended or closed, prepared for use by the interviewer in a person-to-person interaction". A literature review usually guides the interview schedule and focuses on the core questions that need to be asked.

Therefore, in respect of my study, valuable insights concerning the understanding, interpretation and implementation of education policies were obtained because of the depth of the information gathered. In the case of face-to-face interviews, the audio-recorder can create an artificial situation, while unplanned and unnoticed interviewing can be an invasion of privacy which makes certain people uncomfortable (Denscombe, 2010:193). Following these hints in an effort to minimise the limitations, I used interview techniques that built rapport and trust to an extent that the research participants expressed themselves freely with regard to their knowledge, values, preferences and attitudes (Arksey and Knight cited in Gray 2009:375). I conducted telephonic interviews with district officials and circuit managers who were difficult to access physically, following Bryman's (2008:198) assertion that the researcher may conduct the in-depth interviews by telephone as it is much cheaper and quicker compared to face-to-face interviewing.

Interviews need a special type of accuracy in administration if one expects them to yield desired results. Patton (2002 cited in Gray 2009:384) explains that"no matter what kind of interviewing style is used, and no matter how carefully interview questions are worded, all is wasted unless the words of the interviewee are capture accurately". Following this advice, I made use of a digital voice recorder for both the individual interview and focus-group discussions, in order to come up with detailed and accurate data that can be made available for public scrutiny. The audio-recordings captured participants' perceptions, meaning, definitions of situations, and constructions of reality during the interview (Punch 2005:168; Silverman 2010:288). In line with the suggestions of Bryman (2008:198), the researcher may conduct the in-depth interviews telephonically as it is much cheaper and quicker than face-to-face interviewing. I conducted telephonic interviews with district officials and circuit managers who were difficult to access physically.

I followed the interview protocol as set out in steps below:

1. Appointments and determining dates for interviews with the participants were made eight weeks prior to the interview.
2. Permission was obtained from the respondents to use a tape recorder.
3. Verbatim transcriptions of the tape recording were used as a basis for data analysis.
4. Participants were assured that their names as well as the name of their school and responses would remain confidential.
5. The purpose of the interview was stated before the interview session.
6. Questions were repeated in case respondents did not understand them.

I used focus-group interviews with three categories of participants. A focus group is a qualitative research technique in the form of a group interview that relies on the interaction within the group to discuss a topic or topics supplied the researcher, aimed at yielding a collective instead of an individual view (Cohen, Manion and Morrison 2011:436). Babbie (2010:323) and Johnson and Christensen (2008:210) identify three distinct features of a focus group as follows:

(a) There is a 'focus' to the session, with discussion based on an experience about which all participants have similar knowledge.

(b) Particular emphasis is placed on the 'interaction' within the group as means of eliciting information.

(c) The moderator's role is to 'facilitate' the group rather than lead the discussion.

The researcher facilitated the discussion by organising the date, venue and time suitable for the participants. Group members responded to the questions under discussion.

### 2.21.3 Document analysis

It is important to distinguish between the literature review of a study and using documents as part of the data-gathering strategy. According to Nieuwenhuis (2006:19-20) the two do overlap in the sense that they both deal with the data sources in some or other written format, but including document analysis as part of the data gathering strategy is something distinct from the literature review that all researchers involve themselves in during a research project. Documents are like texts that can be analysed for their historical value (McMillan and Schumacher 2010:361). Document analysis was concerned with the content and quality of the education policies developed in public schools. The documents available in public schools enabled me to identify the gap that exists between national, provincial and school-based policies. The origin of some challenges facing school managers and educators in the implementation of policies were also noted. Since data contained in documents can be distorted and irrelevant (Best and Kahn 2006: 257), I ensured that the documents used were subjected to a thorough scrutiny. Mandatory education policies developed in public schools were accessed at sampled schools upon request. Document analysis was used to triangulate where possible what emanated from the interviews with the various participants and from the research. The limitations in this study were the quality of the policies as they may have been developed by inexperienced members of the SGBs. The lifespan of the policies at school is three years and amendments should be made by the newly elected SGBs within 90 days from the handing-over date. The available policies at schools may be out-dated.

The success or failure of document analysis is dependent upon the manner in which it was conducted. Creswell (2005:220) suggests certain guidelines that should be followed in the document analysis process. These include the identification of useful documents: distinguishing between private and public documents; obtaining permission to use the documents; determining the accuracy, completeness and usefulness of the documentation before obtaining permission to use them. I wrote letters to school managers requestin for permission to analyse data in their institutions.

In this study, I studied university dissertations, research articles, journals of education, newspaper reports, educational encyclopaedias, books on leadership and management, education policies developed nationally and provincially, newspaper articles, and education circulars; listened to radio or television presentations and school policies related to the transformation of the South African education system and the provision of quality education in public schools of Limpopo Province. In the next chapter, I categorised the literature content into themes and topics such as the definition of policy, objectives of the policy research, and dimensions of policies, the policy formulation process, the implementation of education policies in terms of challenges, achievements and the state of quality education provision in public schools.

## 2.22  DATA ANALYSIS PROCESS

Data may be collected in large volume but valuable data will be selected and presented as findings of the empirical study. According to Blaxter, Hughes and Tight (2008:183), analysis is an ongoing process which may occur throughout the research with earlier analysis often informing later data collection. According to Cohen, Manion and Morrison (2011:537), data analysis is a rigorous process which involves "organizing, accounting for, and explaining the data, in short, making sense of the data in terms of participants' definitions of the situations". I adopted a thematic data analysis process, which is defined as a method followed in identifying, analysing and reporting patterns or themes within data (Braun and Clarke 2006:101). I analysed data by following Braun and Clarke's five-phase thematic analysis strategy which covers the following procedure: familiarising oneself with data; generating initial codes; searching for themes; reviewing themes; defining and naming themes; and generating a report (Braun and Clarke 2006:87).

I transcribed and transferred recorded information to the laptop, which permitted repetition of selected recording with ease. Files were selected and repeated several times until the message was clear in all categories of participants. Themes and categories were systematically identified across the data sources and then grouped together through simultaneous coding and analysis (Glasser and Strauss 1967:102) in Cohen, Manion and Morrison *et al* (2011:600). Coding entailed identifying words and segments in the transcripts, sometimes known as unitising (Denscombe 2010:284). A major feature of qualitative analysis is coding data, a method that was used in this research to organise data and come up with categories. Hesse-Biber and Leavy (2006:349) point out that "coding is the analysis strategy many qualitative researchers employ in order to help them locate key themes, patterns ideas and concepts that may exist within their data". Marshall and Rossman (2006:160) also view the coding of data as the formal representation of analytic thinking, whereby generating categories and themes constitutes the tough intellectual work of analysis.

Each identified pattern or theme was allocated a name and placed into a respective category. Since data analysis in qualitative research is a continuous process that involves sorting, sifting, reading and rereading of data (Castellan 2010:7), I reviewed the categorised patterns and generated a report that enabled interpretation of the results. In reviewing themes, I was also motivated by the view that qualitative research should be able to draw interpretations that are consistent with the data collected (Alhohailan 2012:11; Marshall and Rossman 2006:160). Coding is not merely a technical task, therefore as data is coded, new meaning and understandings may emerge, making it necessary to adjust the original plan. According to Denscombe (2010-284) memos are crucial "as a means for logging new possibilities in relation to the analysis of data". Coding and memoing were therefore regarded as interrelated aspects of data analysis that were undertaken simultaneously (Marshall and Rossman 2006: 160-161). In line with the advice from Corbin and Strauss (2008:63), I began coding soon after the first interview since the first data serves as "a foundation for data collection and analysis".

Accordingly, the constant comparative method of qualitative data analysis was followed in this research (Cohen, Manion and Morrison 2011:557). The constant comparative approach is the analytic technique of qualitatively comparing and contrasting data from various data sources in a

bid to develop categories and to look for patterns among the categories (McMillan and Schumacher 1993:487; Silverman 2010:280). Silverman (2010:280) indicates that "the constant comparative method involves simply inspecting and comparing all the data fragments that arise in a single case". This method is compatible with triangulation. Cohen, Manion and Morrison (2011:601) indicate that it can proceed from the moment the researcher starts to collect data, to seeking key issues and categories, to discovering recurrent participants (Corbin and Strauss, 2008:480). Therefore, as categories and themes were developed and coding was advanced I began to interpret what I had learnt, because interpretation "brings meaning and coherence to the themes, patterns, categories, developing linkages and a story line that makes sense and is engaging to read" (Marshall and Rossman 2006:161-162). The process of analysis goes hand in glove with interpretation.

As I was interested in the implied meaning of discussions (Denscombe 2010:275), I therefore personally transcribed the interview data verbatim. Transcription is a vital process of the research and by personally transcribing my own tapes, such an experience assisted me to get "into contact with the data at an early stage" (Gray 2009:503). Memos were written as I transcribed raw data and at the same time studied my reflective journal in order to engage deeply with my data. For Denscombe (2010:283), the first important task for the researcher is "to become thoroughly familiar with the data". This meant that the transcribed scripts had to be examined through reading and re-reading in order to make sense out of the data in line with my research questions.

## 2.23  TRUSTWORTHINESS OF THE RESEARCH

The question of validity and reliability is just as important in qualitative research as it is in quantitative research (Cohen, Manion and Morrison 2011). The four key criteria of qualitative research that determine its trustworthiness are credibility (internal validity), transferability (external validity), dependability (reliability) and conformability. (Cohen, Manion and Morrison 2011:181)

## 2.23.1 Reliability

Research results need to be tested against the backdrop of validity and reliability, which will mirror data as measured against aims and objectives of the research topic. Newby aptly calls validity and reliability the "corner-stones" of any research (Newby 2010:121). I made sure that the information gathered represented the situation that was intended to be examined. If another researcher were to investigate using the approach used for this research, the results should be the same. Reliability is fundamentally concerned with issues of consistency of measures and the degree to which the measure of a concept is stable (Bryman 2008:698, Bryman and Bell 2011:157). I interviewed research participants individually and in groups and the data collected at different sessions were closely related. The interview, observation and document analysis that were analysed separately and finaly compared to check similarities and differences of data that were brought about by these instruments.

## 2.23.2 Validity

According to McMillan and Schumacher (2010:104), the term validity refers to "the degree to which scientific explanations of phenomenon match reality", in other words the truthfulness of findings and conclusions (Cohen, Manion and Morrison 2007:136). Similarly, Bryman (2008:151) and Burns (2008:509) argue that validity refers to the issue of whether an instrument or indicator that is designed to gauge a concept actually measures that concept. Maree (2010) and Teddli and Tashakkori (2009:248) share similar views.

Newby (2010:17) lists the criteria that we need to demonstrate in order for our piece of research to be deemed valid and convincing to others and I described how I manage to adhere to them.

*"Our data has to be representative of the issue we are investigating in the study"*. I was rigorous in sampling and not choose schools based on accessibility and familiarity. Purposive sampling enabled me to collect data that answere all the research questions and archieved the aim and objectives of the study. *"Our argument and the evidence that supports it have to be complete"*. I did a lot of groundwork on this topic through the literature review and qualify the evidence through observation and interviews. *"The presentation of our research processes and results has*

*to be transparent and honest"*. Data was collected, interpreted and critically analysed systematically

### 2.23.3 Methods of improving reliability and validity

According to De Gaetano (2007:145), triangulation is one of the most useful methods to improve the reliability and validity of qualitative research. Three recognised forms of triangulation are relevant to this study. In the first place, methodical triangulation took place by using more than one data collection method,such as interviews and focus-group interviews. Secondly, theoretical triangulation took place by using more than one theoretical perspective to interpret data. In the third place, data triangulation took place by using two or more kinds of data sources such as interviews and a literature study. External reliability was implemented. This refers to the degree to which another researcher working in the same site or similar one would be able obtain consistent results. I interviewed and observed participants at different places but they gave me related responses.

Research findings will be valid if from the start, the data gathering instruments that were used were bias free. The way the researcher phrases questions can connote some bias. Research bias is a serious threat to the validity of any research. This meant that all questions had to be carefully phrased. According to Johnson and Christensen (2008), research bias means obtaining results that are consistent from selective observations and selective recording of information. It was pertinent to capture all data as said through the use of an audio recorder so that l would not record in a selective manner. Also, validation did not wait, it occured throughout the study especially during observations, interviews, conversations and recording of data.

The following strategies for validating findings suggested by Johnson and Christensen (2008) were applied during the study: Triangulation of different data sources of information by examining evidence from the sources and using it to build coherent justification for themes; spending an extended period of time in the field of study with the participants in order to cultivate and develop an in depth understanding of each other and the phenomena being studied; using thick, rich descriptions to convey the findings; using member checking to determine the accuracy of the findings; and participant language and verbal accounts should be used.

In this study I used theoretical and data triangulation forms. Three data collection intstruments namely, document analysis, observations and interviews were used. In theoretical triangulation , phenomenology, ontology, interpretive and positivist approaches were used to elicit data from the participants. Moreover, as De Gaetano (2007:145) has recommended, in order to meet the four criteria discussed above to ensure trustworthiness and avoiding biases regarding the data, I applied the following procedure:

1. A triangulation of methods (such as, the interview sessions and focus-group discussions) was used and the comparison of the findings obtained with other research findings studied in the literature phase of the study.
2. During data collection, I verified whether the participants could identify with, or recognise the experiences described by the other participants in the interviews and focus-group discussion.
3. During the interviews, the data was recorded mechanically with a digital voice recorder to provide an accurate and relatively complete record (McMillan and Schumacher 2006:205).
4. The interviews and focus-group discussions were conducted in settings within the educational institutions and offices to reflect the reality of the participants' experience accurately. Importantly, the questions posed were phrased so that the participants could understand them easily (McMillan and Schumacher 2006:351).
5. Clarification of questions for the participants was done when they were unsure of their meanings.
6. Purposeful sampling decisions were done carefully.

In this way, using the literature review, interviews, observations and document analysis, problems were eliminated, problem areas addressed and strategies for improvement recommended. An illustration of triangulation of data follows below:
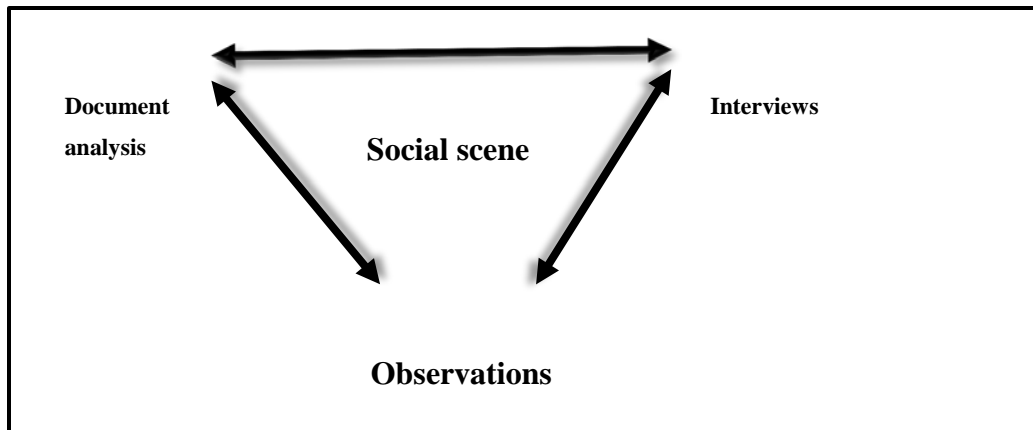
**Figure 0:1 Triangulation in this thesis**

### 2.23.4  Objectivity and neutrality

Quantitative researchers define objectivity as 'the results of the regimented, impartial or unbiased and value-free way in which it [the research] is conducted' (White 2005:199). In this qualitative study where I was a participant observer, it was impossible for me to distance myself from the collection of data. According to McGrath (2007:1401), neutrality refers to the freedom from bias in research procedures and results and "whether the findings would be consistent if the inquiry" was to be replicated with the same participants or in a similar context. In this study, I attempted to remain as objective as possible, guarding against subjective values, perspectives and biases which could influence the interpretation and description of data. The strategy of confirmability was employed to ensure neutrality (McMillan and Schumacher, 2006:207). It aims at evaluation of the actual data and focuses on whether the results of the researcher (that is, raw data and the researcher's analyses and interpretations) could be confirmed by others. I requested my colleaque to go through data and interpreteit. The conclusions draw by my friend were more or less the same as mine.

### 2.23.5  Generalisability of research results

Mills (2007:96) explains that the generalisability of research results refers to the applicability of research findings in settings and contexts that are different from those in which the data was

collected initially. According to Costello (2003:46), this concept refers to the applicability of the conclusions of the research project, within and outside of the context in which the research was completed. The research findings, conclusions and recommendations could not be applicable in other provinces in South Africa as the historical,  political and socio-economic backgrounds are not the same.

### 2.23.6  Credibility

Credibility as applied in qualitative research relates to the extent to which the research findings are believable (Pitney and Parker 2009:63). In other words, for the researcher to ensure credibility of his or her study there should be supportive evidence in the form of data for the accuracy of the research findings. Trustworthiness of a qualitative study, on the other hand, can be assured by making use of triangulation (Kolb 2012:85), that is, by using multiple data-collection methods. To meet the demand for credibility and trustworthiness, I followed two procedures that I regarded as important, namely, triangulation of data collection and member checks. In the first instance, I felt strongly that to ensure the credibility of my study and the accuracy of the research findings there had to be supportive evidence in the form of quality data. For this, I triangulated data collection strategies, namely, the study of documents, observation and interviews. In the second instance, data from interviews was subjected to member checks, that is, verification by staff members in the selected schools who were not part of the study. The amount and the quality of data generated through the three strategies as well as the verification of the collected data by other staff members enabled me to conclude that the research questions stated earlier on were answered. Therefore, the research project could be rendered credible.

## 2.24  RESEARCH ETHICS

Research ethics, according to Johnson and Christensen (2004:94), are principles and guidelines that help researchers to uphold things regarded as valuable. Ethics is defined as a code of behaviour and study of morals (Thesaurus 2008:264). Ethics are the principles of right and wrong that can be used by individuals acting as free moral agents to make choices to guide their behaviour (Masiiwa and Kabanda 2006:104). According to Gomm (2008:365), the term research ethics refers to "rules of morally good conduct for researchers". Written permission was thus

obtained from Limpopo Province Department of Education which stated clearly that the research would be conducted in accordance with the Code of Research Ethics as determined by the University of South Africa.

Ethics may be perceived as the application of moral principles while interacting with others, in order to be respectful and fair and promote healthy relationships (Sikes 2004:25). The principles are summarised by Trochim and Donelly (2008:24) as voluntary participation, requiring that people not be coerced into participating in the research; informed consent, meaning prospective research participants should be fully informed about the procedures and risks of participating in the study and give their consent; confidentiality, a standard applied to protect the privacy of research participants; and anonymity, meaning the participant has the right to remain anonymous throughout the study, even to the researcher. The participants were also told that they could withdraw at any time if they felt uncomfortable with the research process (Segwapa 2008:62). The ethical considerations are discussed below.

### 2.24.1 Informed consent and permission

Participants must be granted the opportunity for voluntary participation in the research study and should give permission in writing.

Johnson and Christensen (2008:109) point out that informed consent refers to the procedures by means of which individuals choose whether to participate in an investigation. They make their decision after being informed of the purpose of the study, procedures of the study, the risks and the right to ask questions, the benefits of the study that will accrue to the participants, alternative procedures and limits of confidentiality prior to participation or non-participation.

In this research, I tried to be sensitive and diligent when describing myself and securing consent from the participants. I explained that the dissertation would be available so that anyone interested may have access to the findings of the research. Names of schools and participants have been withheld to protect schools and individuals.

Negotiating access to data collection in this research, written permission to conduct the study was gained from Limpopo Department of Education. To safeguard the rights of participants in

this study, I received authority from the Head of Department to visit departmental officials at district, circuit and schools for conducting the research. Access and entry are sensitive aspects of qualitative research, hence I was aware of the need to establish rapport and trust as well as authentic communication patterns with research participants (Marshall and Rossman 2006:5). Each participant signed two copies of the consent letter and retained one copy as evidence of his or her free will to participate in the research study.

## 2.24.2 Anonymity and confidentiality

Information that is obtained from respondents may make other people feel bad and strain relationships if exposed. It was therefore important to protect and guard all information that was gathered during the study since it was confidential and had been provided in confidence. Krathwohl (2004) and Anderson (2009) view confidentiality as the control of access to information and the guarantee that data will not be shared with unauthorised people. Participants have a right to have their responses kept in strict confidence and therefore the participants' identities should not be revealed to anyone. Thus, it was important to assure participants thattheir responses will strictly remain known to the researcher only. I ensured privacy by using three practices namely confidentiality, anonymity and appropriate storage of data. This was important because educators, for example, were being requested to the source of information would remain between the two of us. Also, the sites and the participants remain unidentifiable in the final research thesis. As indicated earlier on, the names of the districts, schools and participants had to be coded in a manner that was known to me only, thus ensuring anonymity and confidentiality. Anonymity refers to keeping the identity of the participants from being known (Anderson 2009).

According to Flick (2006:49), the anonymity of the participants must be maintained and all the participants must be given the assurance that the data collected from them will be treated as confidential. Research records that may indicate the participants' identities should be removed as a means of ensuring that confidentiality is maintained throughout the investigation (Wallen and Fraenkel 1991:40; Mouton 2008:23-244; Seidman 2006:67). In the course of this investigation, care was taken that the identity of the schools that participated in the research was not revealed. The researcher assured participants of their protection from harm regardless of whether they

volunteered for the study or not. Furthermore, questions were formulated in a polite manner and did not humiliate their dignity.

In this study, participants' right to privacy was protected, ensuring confidentiality. Confidentiality refers to control of access to information and the guarantee that data will not be shared with unauthorised people (Krathwohl 2004:215; Anderson 2009:75). In addition, settings and participants were not identifiable in print. Therefore, while I knew the names of the participants, I did not divulge them. Instead, imaginary locations and disguised features of settings were used in such a manner that they appeared similar to several possible sites.

During data collection and analysis I maintained the following principles: names of participants were not written on tapes, notes and transcripts, but rather pseudonyms or numbers were allocated to them to hide their identities. Lists containing the real names and pseudonyms/numbers allocated to the participants were not stored near the tapes, notes or transcripts of the recordings. Names were not disclosed to other people who had access to the data e.g. the supervisor, independent coder or editor. All participants and school managers who gave me permission to conduct observation and access documents and all who participated in this study were given full assurance of confidentiality and anonymity in writing. Other than identifying factors such as gender and race of the participants, no personal identifiable information was divulged or specific schools identified by name.

### 2.24.3 Voluntary participation

Voluntarism entails applying the principle of informed consent, and thus ensuring that participants freely choose to take part or not in the investigation and guarantees that exposure to risk is undertaken knowingly and voluntarily (Cohen, Manion and Morrison 2007:52). In this study, each participating individual was requested to be interviewed and each willingly accepted. All participating individuals were fully informed in advance of the purpose of the study and given an option to discontinue their participation, for any reason whatsoever, at any time during the process. Permission to record the interviews using digital voice recorder was obtained prior to the beginning of the interview schedule. According to Cohen, Manion and Marrison (2011:78) voluntarism entails applying the principle of informed consent and thus ensuring that participants

freely choose to take part (or not) in the research and guarantees that exposure to risks is undertaken knowingly and voluntarily. Diener and Crandall (1978) cited in Cohen, Manion and Morrison (2011:78) defined informed consent as the procedures in which individuals choose whether to participate in an investigation after being informed of facts that would be likely to influence their decisions. This meant that I had to explain to the participants the purpose of this study, the anticipated benefits of study, procedures, risks and the right to ask questions. Informed consent also means that a participant was free to withdraw from the study even when it had already started. Fortunately, in this study no participant withdrew after having agreed to take part. Issues of establishing rapport and collegiality become critical as well as anonymity and confidentiality of all information.

## 2.24.4  Competency and relationship with participants

According to Cohen, Manion and Morrison (2007:52), competence implies that responsible, mature individuals and skilled individuals participate in an investigation. The researcher has to ensure that he/she does not engage individuals incapable of making decisions because of immaturity. In this case, I possess a high level of competency and the skill necessary for this undertaking. I am the principal of a primary school with 725 learners and twenty educators and work with circuit managers and district officials in executing my daily responsibilities. Based on the above, I endeavoured to maintain a healthy research relationship with each participant and shared a high degree of trust and respect throughout the investigation. I acknowledge the importance of ensuring that this research was conducted in a competent manner. In order to do this, I followed Strydom's (2005:63-64) advice, namely that the researcher should remain sensitive to the needs of the participants in the study; maintain objectivity and refrain from making value judgements about the values and points of view of participants, even if they contrast sharply with his/her own values. I treated all participants with the diginity they deserve at all times.

## 2.24.5  Harm, caring and fairness

McMillan and Schumacher (2000) identified a potential ethical problem that could be associated with this study, the principle of persons being treated as ends themselves rather than as a means

to an end. This happens when a researcher is only concerned about finding results regardless of any personal humiliation that some people may experience and suffer or loss of interpersonal relationships. Johnson and Christensen (2008) view the treatment of research participants as the most important and fundamental issue the researcher must confront because research with humans has the potential for creating a great deal of physical and psychological harm. In this respect the researcher was careful to ensure care and fairness in all actions. Participants were encouraged to focus on making meaningful contributions towards the implementation of neducation policies in ensuring that quality education is provided for in public schools rather than using this as an opportunity to expose other people's weaknesses or even settle scores. Participants were encouraged to relate issues and aspects as accurately as possible without attacking personalities. McMillan and Schumacher (2000) point out that there are no guarantees that observing ethical issues will always result in a happy ending. Thus, in addition to being sensitive about ethical issues the researcher also highlighted the power of the participants in the success of the study. This was done with the hope that their sense of importance could compensate for inconveniences that they may have suffered. Participants were also encouraged to discuss any problems that they may have encountered during interviews

## 2.25 CONCLUSION

I used qualitative research methodology to collect and analyse data on the implementation of education policies in Limpopo Province. The interview schedule was designed to gather data from the participants who were sampled in a purposive manner. Interview questions addressed the research questions as described in Chapter One. Research ethics were observed at all cost and the concepts of reliability and validity were adhered to. In the next chapter, I presented the data collected through document analysis, observations and interviews. Data presented include verbatim quotations from the participants' responses, analysis and interpretation of data.

# CHAPTER FOUR:
# DATA PRESENTATION, ANALYSIS AND DISCUSSIONS ON FINDINGS

## 3.1   INTRODUCTION

My study focused on education policy implementation. The purpose of this research study is to improve leadership, management and administrative practices of the state's education system in South Africa for the provision of quality education. I collected data with the intention of answering the main research question, namely ***"How do education managers in Limpopo Province interpret and implement the selected education policies for the provisioning of quality education in public schools?"*** The sub-research questions were: *What knowledge or interpretations of educational policies do school leaders and managers have? Why do school managers have such interpretations of these education policies? What view of leadership and management role is held by education managers about the implementation of education policies? What roles should the provincial, district, circuit and school managers play in the implementation of education policies in public schools?* (cf. 1.4) Results are presented below.

## 3.2   DATA COLLECTION INSTRUMENTS USED

As the school manager in one of the districts and circuits in the Limpopo Province, I was a participant observer. I attended provincial, district and circuit education meetings, and conducted school-based meetings with educators, support staff, School Governing Bodies, parents and the community. As the chief accounting officer of a primary school, I have implemented a number of education policies in addressing specific challenges in the leadership and management of quality education. For the purposes of the study, I visited five primary schools and five secondary schools in a series of days and attended staff and SGB meetings. I completed the observation schedules for school managers. The focus area of the observation was the analysis of the documents such as finance policies, admission policies, SGB's constitution, the code of conduct for educators, health and safety policies, Academic Performance Improvement Plan, School Equity Plan, Circuit Equity Plan, District Equity Plan and School Leave register. The findings were recorded on the observation sheets designed for this purpose. (cf. 1.9; 3.5)

I wrote letters to primary and secondary schools requesting permission to observe and analyse their school-based policies. The final appointments and reminders for observation schedules were made telephonically and via emails. The criteria for document analysis were drawn up and enabled me to record data relevant to the understanding and interpretation of education policies. Policies were evaluated on criteria such as preamble, legislative framework, focus area of the policy, the impact of the policy on the provisioning of quality education, challenges facing implementers based on their structure, and the weaknesses of the existing policies. Findings, conclusions and recommendations were to be given for each document analysed.

Individual and group interviews were conducted. The code of ethics for research as approved by the ethics committee of the University of South Africa was adhered to at all times. A copy of the ethical clearance certificate was shown to all participants. Participants were drawn through purposive sampling as follows: three labour relations officers, three curriculum managers, three district finance managers, three human resource managers, six circuit managers, and three governance managers. Twenty-one (21) individual in-depth interviews were conducted at different venues and times. Three focus-group interviews were conducted with a group of four educator union representatives, ten (10) school managers and ten (10) educators in public schools. The interview schedules for both individual and focus groups were developed. The choice of venue and times for interviews were communicated to the participants well in advance. All participants signed the consent forms and forms for agreement were signed by focus-group participants. A copy of the consent letter was handed over to each participant to keep.

At the beginning of the interviews, I clarified the reasons for the study, assured participants that there were no correct or wrong answers and that the research would not harm them either emotionally or physically. I used letters of the alphabet to represent the names of the participants, for example, participant A for Circuit Manager. All the interviews were recorded using voice tracer, while permission to use the recording was part of the consent form. Raw data was transcribed verbatim. (Refer to chapter 3 section 3.4.4.)

## 3.3 PRESENTATION OF DATA COLLECTED THROUGH DOCUMENT ANALYSIS

I requested permission from five primary and three secondary schools to analyse their documents. I developed an observation tool based on the research question and aims of the study. The documents reviewed were finance policy, admission policy, SGB constitution, code of conduct for learners, code of conduct for educators, health and safety policy, academic Performance Improvement Plan, School Equity Plan and School registers. The rationale for choosing these school-based policies and plans was to evaluate whether they meet minimum criteria for school policies, and the competence of the school manager and his colleagues on analysis and understanding of National Education Policies. My findings indicated that most policies do not meet minimum requirements. The criteria on which I based my judgement was the preamble, legislative framework, focus area of policy or plan, the impact of such policy on the provision of quality education, challenges and shortcomings of such policies in terms of implementation. Most school managers developed such policies on behalf of the school governing bodies merely for compliance. This was evident when most of the policies were kept in cupboards full of dust, while some very clean ones might have been a sign that they were not in use. (cf. 1.9.2.3; 3.5.3)

## 3.4 PRESENTATION OF DATA COLLECTED THROUGH OBSERVATIONS

I was granted permission by the Department of Education to stay in selected schools for observing the daily functioning of their schools. I wrote daily observation notes and related them to the phenomenon under investigation. I attended staff meetings, SGB meetings and parents meetings to evaluate their conduct and decision-making systems. My findings were that most school managers run their schools using common sense. They did not display consistency and fairness in dealing with challenges at their institutions. As participant observer, I experienced that educators violate some rules intentionally, trusting that their educator unions will defend their cases of misconduct. There is a lack of policy implementation, monitoring and enforcement of rules at public school.

## 3.5  PRESENTATION OF DATA COLLECTED THROUGH INTERVIEWS

There are different styles the researcher can follow to analyse the collected data. I followed the data analysis process as advocated by Henning, Van Rensburg and Smit (2004); Cohen *et al* (2000); and Maree (2007). The data analysis steps suggested by McMillan (2002:1999) were used (refer to section 3.4.4 in the previous chapter). I organised the transcribed data into themes and sub-themes. Themes for interview questions that were similar but responded by different participants were categorised and analysed as one theme. Direct quotations from raw data were included in other themes.(cf. 2.9). List of themes derived from interview data is given below:

**THEME: 1**   Knowledge and understanding of education policies

**THEME: 2**   Participation of stakeholders in policy formulation and implementation

**THEME: 3**   Relationship between policy makers and implementers

**THEME: 4**   Challenges facing education managers in policy implementation

**THEME: 5**   Strategies that can enhance effective policy implementation

**THEME: 6**   Relationship between education policies and quality education

**THEME: 7**   The relationship between funding and provision of quality education

**THEME: 8**   The roles of stakeholders in the provisioning of quality education

**THEME: 9**   Recruitment of education managers and district-based personnel

**THEME:10**   Empowerment of personnel in the Department of Education

**THEME:11**   Understanding of labour policies in relation to educators' misconduct

**THEME:12**   Provision of quality education in public schools

**THEME:13**   Monitoring and quality assurance systems in education

**THEME:14**   The management and governance of public schools

Data was presented under the following research questions and themes as summarised in Table 4.1 below:

**Table 3:1 Research questions addressed by data themes**

| NO | RESEARCH QUESTIONS | THEMES |
|---|---|---|
| A | How do education managers in Limpopo Province interpret and implement the selected education policies for the provisioning of quality education in public schools? | 7 and 8 |
| B | What knowledge or interpretations of educational policies do school leaders and managers have? | 1, 4, 6, 10, 11, 12 and 13 |
| C | Why do school mIanagers have such interpretations of these education policies? | 1, 4, 6, 11, 13 and 14 |
| D | What view of leadership and management role is held by education managers about the implementation of education policies? | 2, 3, 8, 9, 11, 12, 13 and 14 |

## 3.6   DATA PRESENTATION

### 3.6.1   THEME 1: Knowledge and understanding of education policies

Knowledge of education policies is essential for all education managers entrusted with the core responsibilities of implementing them for effective leadership and management of the education institutions under their control. Policy learning should therefore be part of the education managers' area of development or empowerment. Theirauf (1999) defines knowledge as "information about information". Information could therefore be said to constitute data with relevance and purpose. It is generally believed that if an organisation can increase its effective knowledge utilisation by only a small percentage, great benefits will ensue (King 2009). Policy learning should therefore be part of the education managers' area of development or empowerment. Policy is indeed an intellectual understanding amongst colleagues of the course to follow to achieve objectives most effectively, as proven by experience. Policy manifests on different levels, i.e. political party policy; governmental policy, or cabinet policy; departmental policy; operational or administrative policy (Biotes *et al* 1996:311-312).(cf. 2.7)

The policy must be conceptually clear and simple, theoretically sound, and stated in terms of desired changes achieved among target groups. It is vital that the means-ends analysis actually represent real cause-effect relationships. An understanding of the policy process, and the role and responsibilities of the policy analyst, could further contribute to the generation of feasible, realistic and affordable policy options, which could be implemented to the benefit of the public, as well as implemented to be benefit of the country, within the context of Africa and the broader global environment. Education managers should master the focus areas, and essential principles or aims and objectives of each education policy that regulate their performance or the execution of their duties. For example, the essential principles of SASA are the elimination of poverty through proper education; democratic transformation of society; advancement of various cultures and languages, and establishing a partnership between all stakeholders who have an interest in education, i.e. the state, parents, learners, educators and other members of the community in the vicinity of a school (Joubert and Prinsloo 2008:25). Adequate knowledge of education policies may address the question "How can national policy aspirations translate into clear policy guidelines which are meaningful at a local level?" The quest for the implementation of education policies may therefore be viable when policies are clear, unambiguous and accessible at local level.(cf. 2.4.1 – 2.4.5)

Questions that sought the knowledge and understanding of what education policies are, the nature of public policies in the South African context and the classification or categories of policies, were part of the interview schedules. Questions were addressed to managers at different levels with the aim of comparison of the level of understanding of the selected education policies in the Limpopo Province, South Africa.

### *Level of understanding of curriculum managers on aims and objectives of policies*

The participants were expected to answer the question "*Briefly discuss the aims and objectives of the following education policies.*" I wanted to understand how curriculum managers understand and interpret the selected national policies on education when executing curriculum management responsibilities in public schools. The curriculum managers responded as in Table 4.2 below:

**Table 3:2 Aims and objectives of the education policies**

| Items | Participant A | Participant B | Participant C |
|---|---|---|---|
| **5.1. Constitution of RSA** | It focus on the Bill of Rights which include the right to education in school of your choice | It spells out the democratic rights of the learners in schooling | It informs us of how we must conduct ourselves in the society in a harmonious way. |
| **5.2. NEPA** | It focuses on the right to education, admission policy and the guidelines for provincial education policies | It is an umbrella for all provincial and school policies | How provincial departments should operate in education provision |
| **5.3. SACEA** | It deals with code of conduct for educators | It regulates teachers on how to behave when they execute their duties | Body to keep educators to what they must do, code of ethics, code of conduct. |
| **5.4. EEA No. 76** | Employment conditions of educators at schools | It states the number leave days for educators | How to employ education conditions of service. How educators must behave. |
| **5.5. EEA No. 55** | To redress the past injustice in terms of male versus female employment | To balance the appointment of males and females at workplace | Abnormal situation to be addressed as it happened in the past. |
| **5.6. PFMA** | To manage the public finance correctly | To provide guidelines on the use of public funds in all public institutions | Management of public funds, how to use such funds appropriately. |
| **5.7. SASA** | It focuses on school governance and the use of funds at school level | The Act controls all the schools in South Africa. | To regulate how school should operate-teacher, learner, parents. |
| **5.8. LRA** | The relationship between employer and employees | The rights of educators and the discipline at work place. | To regulate the way in which employees should be treated |

Curriculum managers drive the entire curriculum delivery to the learners in public schools. Education policies after 1994 were developed with the aim of changing the fragmented education system into one system of education that can provide quality education to all South African citizens. The Constitution of RSA, NEPA, SACEA, EEA No. 76 of 1998, EEA No. 55 of 2000, PFMA, SASA and LRA are acts enacted by parliament to drive educational reform towards the

provision of quality education. The majority of the participants know the aims and objectives of NEPA, SASA, PFMA, EEA, 76 of 1998 but displayssome limitations on other policies. Data collected suggests that curriculum managers are not well conversant with the constitution of RSA in relation to the provision of education. NEPA and SASA are the two education policies where aims and objectives have been clearly defined by the curriculum managers. One may conclude that education managers focus on policies that directly affect their area of operations and do not consult other education policies that can impact on their entire performance.

### Knowledge of district finance managers on education policies

Particpants were asked: "*What are the aims and objectives of the following education policies and prescripts?*" I selected three policies and one prescript that are used at Limpopo Provincial Department of Education, as I was interested in establishing the relationship that exists between funding and the provision of quality education. The district finance managers responded as in Table 4.3. below:

**Table 3:3 Level of understanding of the education policies by the district finance officer**

|  | PARTICIPANT A | PARTICIPANT B | PARTICIPANT C |
|---|---|---|---|
| 2.1. NEPA | The issue of teaching and learning and ensure that each learner must be educated. | NEPA deals with natural department of education | I don't know |
| 2.2. PFMA | It deals with revenues and how the money is spent | Management of finance of the country. | Regulate the usage of funds. Specify who is accountable for specific financial responsibility |
| 2.3. SASA | I don't know. I don't want to speculate | Controls the schooling environment in the country. | Guidelines on how to use norms and standard and donations by all schools. |
| 2.4. Finance Management Prescript Limpopo 2011 | Procedures to make sure that school use money properly. | Set standards-direct how to use funds must be used. | SASA & prescripts and circulars form the district as reminder |

Most finance managers at district level have basic knowledge of the education policies. They do have adequate knowledge of the PFMA and prescripts. One may conclude that their interests are on the education policies relevant to their core areas of work. However, the use of funds on educational institutions must address the expectations of the state which are embodied in NEPA and SASA. Therefore, knowledge on SASA and NEPA is essential to ensure that there is value for money.

*Knowledge of the governance managers on education policies*

"*What are the aims and objectives of the following education policies?*" The researcher selected three policies that seem to be the handbook for the effective and efficient functioning of governance managers. SASA and PFMA were established to ensure that SGBs execute their functions in line with the expectations of the National Department of Education and the Constitution of the Republic of South Africa. The responsibility of the governance managers is to ensure that there is effective school governance by all SGBs within the district. The financial management of the school fund is one of the core responsibilities of the SGB. Therefore, the governance manager (GM) must have adequate knowledge of PFMA. The GMs responded as in Table 4.4. below:

**Table 3:4 Level of understanding of education policies by the governance managers**

|  | **PARTICIPANT A** | **PARTICIPANT B** | **PARTICIPANT C** |
|---|---|---|---|
| **2.1. SASA** | Regulate school-admission and payment of norms and sgtsndards | Good governance | Redress, we have uniform schooling schools governed by |
| **2.2. PFMA** | Regulate the management of funds in all components of the department. | Utilisation of funds (21 schools) and guide on how to use school fund in the correct way. | Efficiency use of funds |
| **2.3. NEPA** | Manner in which education is regulated at school. | Overall Act for many acts and policies e.g. SASA | Admission policy HIV & AIDS policy Enacted by Act of parliament |

Two of the three governance managers have an understanding of SASA and PFMA but know very little about NEPA. One of the participants described NEPA as "Overall Act for many acts and policies, e.g. SASA". This kind of response suggests that the GM does not know the aims and objectives of NEPA. The monitoring role of the GMs in encouraging the SGBs to utilise the funds towards the attainment of the desired goals of the Department of Education could not be achieved if aims and objectives of NEPA are unknown.

*Level of understanding of human resource managers on education policies.*

I asked question on the aims and objectives of the Employment of Educators Act, 1998 (Act 76 of 1998), Employment Equity Act, 1998 (Act 55 of 1998), Basic Conditions of Employment Act, 1997 (Act 75 of 1997), as well as the Labour Relations Act, 1995 (Act 66 of 1995).

In response to the question, the human resource managers expressed the following views:

**Table 3:5 Level of understanding of human resource managers on education policies**

| | PARTICIPANT A | PARTICIPANT B | PARTICIPANT C |
|---|---|---|---|
| **2.1. Employment of Educators Act No. 76 of 1998** | I am not well conversant with that Act but I thinkit controls educators at schools | I have no idea on it | To regulate the rights of the educators' conditions of service |
| **2.2. Employment Equity Act No. 55** | EEA deals with equity at work place | The gender balance at work places | It deals with the equity of males and females. |
| **2.3. BCEA No. 75** | The basic conditions of workers and their rights | Conditions of service for employees | I am not familiar with it. |
| **2.4. LRA No. 66** | It regulates employees in all institutions | Relationships between employer and employees | Relationship between the employer and employees |

The implementation of the above-mentioned Acts on recruitment and utilisation of human resources is vital to ensure consistency and maintenance of competent human resources as well as quality provision of basic education. The human resource managers (HRMs) seem to have little knowledge of policies applicable to their area of jurisdiction. For example, participant A with respect to the Employment Equity Act (Act 55 of 1998) responded "EEA deals with equity at work place". No further explanation on the aims and objectives was given. It can be concluded that there are HR managers who are not acquainted with the applicable legislation that governs their daily activities on the recruitment and management of personnel. Participant A further asserted, "I am not well conversant with the Employment of Educators Act but I think it controls educators at school". The post-provisioning, selection and filling of educators' vacancies are the competences of HRM managers who must execute such duties guided by applicable legislation and procedures. It could be very difficult to implement something one is not sure of. Competency of human capital, expertise in the specific field and effective implementation of policies may lead to the provision of quality education in public schools.

*Knowledge of educators' unions on education policies*

"*What are the aims and objectives of the following education policies?*" I wanted to know if the educator unions were performing their duties in accordance with legislation. Their role as "watch dogs" of the department would only be meaningful if they fully understood the scope of the legislation that governs the educators they represent. One of the educators' union representatives responded as in Table 4.6. below:

**Table 3:6 Knowledge of educators' unions on education policies**

| Policy or Act | Aims and objectives of the policy or Act |
|---|---|
| SASA | Is to see to it that education is run in a way that correct as per standard. |
| EEA No. 76 | I don't know. Eish! It is about…I am not sure of it. |
| LRA | It is about labourers in the Department of Education |
| NEPA | An umbrella of all other education policies in South Africa |

| | |
|---|---|
| **BCEA** | I am sorry, that is a new term to me |

It is evident from interview findings that the educators' union representative has inadequate knowledge of education policies. It may be challenging to represent educators well in the Education Labour Relations Council (ELRC) or bargaining chambers without the knowledge of the policies. EEA describes the appointment of educators as well as their conditions of service. The state of working conditions which may impact on curriculum delivery should be monitored by educators' unions. They should sound an alarm in cases of the failure to provide basic conditions of educators' employment by the Department of Education. One may therefore conclude that the educators' unions are not executing their mandates well. When disputes arise, educators may lose cases and be charged unfairly by their counterparts within the education system.

*Level of educators' understanding of the education policies*

"*Briefly discuss the aims and objectives of the following education policies*". I wanted to establish the foundation which the educators may use for the implementation of the education policies. I have chosen common responses of the educators within the focus-group discussions (refer to Table 4.7 below).

**Table 3:7 Level of educators' understanding of education policies**

| Policy or Act | Aims and objectives of the policy or Act |
|---|---|
| EEA 76 | To employ educators andconditions of service of educators |
| NEPA | I don't know |
| LRA | It talks about labour and relations at work place. |
| EEA 55 | Balance of males and females in appointment at workplace and payment of same salary to educators on the same rank irrespective of gender status. |
| Constitution of RSA | I think it is the guidelines of how people live together |

The majority of educators did not know the basic focus areas of the education policies. "I don't know" is a common response received from educators in respects of aims and objectives of education policies. Other educators just repeated the Act as articulated by the researcher, for example "Labour Relations Act is a relationship between labourers at work places". Lack of

knowledge of the expectations of the Department of Education from each policy leaves a doubt whether educators could implement such education policies for the provision of quality education.

I further directed the question about educators' roles to the educators' union representative in order to assess their contribution in the success or failure of policy implementation. Educator Unions represent educators at the bargaining chambers and all matters relating to labour matters. Educator unions are members of the Educator Labour Relations Council and their membership is based on the number of the affiliates in their union. Educators' conditions of service are prescribed in the Employment of Educators Act, 1998 (Act 76 of 1998) and regulated by the South African Council of Educators and operated in terms of the Education Labour Relations Act. The code of ethics for educators, the implementation of policies, and the provision of quality education seem to be closely related. Therefore, I posed questions to educators' union representatives to probe their understanding of the importance of these measures in policy implementation.

*"What are the roles and responsibilities of educators' unions in the Department of Education?"* The role of educators' union representatives is to protect the rights of the educators in the work place, ensure good working conditions and negotiate for a better living wage. Any genuine desire to improve teaching and learning must necessarily be concerned with the environment in which teaching occurs (Bangs and Frost 2012; Bascia 2008a). One of the primary functions of teacher unions is to act as the vehicles by which teachers' concerns about the conditions of teaching and learning reach the attention of policy makers (Bascia and Rottmann 2011). In a context where teachers by definition have little formal authority to participate in policy discussions, and where educational decision makers have limited knowledge about the dynamics of educational practice, teacher unions' role is critical. There is growing international interest in the nature of close teacher union-government relations and the impact that they may have in ensuring educational quality (McBeath 2012).

In addition to playing this bridging role, teacher unions are sites where new policy ideas are developed. They can be settings for educational experimentation and innovation, research, teacher leadership, and teacher learning, thus increasing the capacity of educational systems

more broadly (Bascia, 2000, 2005, 2008b). Yet in many countries, when government officials develop educational legislation, teacher unions are absent from the table. Often established after, and even in reaction to, formal educational systems, teachers' organisations are not always viewed as legitimate decision makers, and they often are perceived as working in opposition to official educational priorities.

Educators' union representatives responded in more or less the same way. Participant D further indicated that they represent educators when there are disputes on appointments and during hearings for disciplinary procedures in cases of misconduct. One may conclude that the responsibilities of the employers are monitored by educator unions. When resolutions are taken in the bargaining chambers, their implementation becomes the responsibilities of both the Department of Education and of the educator unions. When educational changes take place, the educator unions are consulted on the procedures to be followed in implementing such changes. The implementation of EEA and LRA may be effective when the employer and the educator union representatives are well conversant with the content of these Acts. Refer to Table 4.8. below for participants' response to the interview schedule:

**Table 3:8 Role of Educators' Unions in education policy implementation**

| | |
|---|---|
| A | We as educator unions, when we receive policy from the department, we sit down and analyse it, if it is vital for educators, we call site stewards' council meeting or organise workshops. We look at the positive aspect on the education fraternity. It must be known to educators. It must clear on the expectations of the Department of Education so that educators may implement it for the benefit of all the learners. |
| B | To create conducive environment were educator can work properly. To fight for the wellness of educators. Improve on the issue of incentives for educators. LTSM supply so thateducators can cash out qualityeducation |
| C | To represent the interest of educators as a working force. To ensure that basic conditions are provided by the employer and to register our concerns if the employer is failing to provide such desired condition |
| D | To protect the rights of the educators |
| | |

### 3.6.2    THEME 2: Participation of stakeholders in policy formulation and implementation

Policymaking is inherently a political process. Many factors jostle with evidence to take centre stage in policy formation both at an individual level and at an organisational level (Davies 2004:4-7). Education managers at different education structures are entrusted with the responsibility for leadership and management of the provision of quality education. The national Department of Education formulates policies in respect of general education affairs for the entire Republic of South Africa. The National Minister and Members of Executive Council (MEC) from nine provinces form the National Committee of Provinces, which must ensure that National Education policies are implemented in all provinces. Each province formulates its own policies and creates structures for implementation of both national and provincial policies. Districts, circuits and schools are handled by managers whose core responsibility is the implementation of education policies for the delivery of quality education to all public schools.

Policymaking requires participation of the public where direct representation, empowerment and active decision-making are involved. Policymaking processes should encourage public participation to explore rational options. The current South African government demands public participation in policymaking (Cloete and Wissink 2002:27). The community is an important component of the policymaking process. I wanted to know if all role players were executing their responsibilities as expected and to identify the challenges they experience in policy development. I addressed questions to different education stakeholders in order to determine their level of participation in policy development and how it would impact on the implementation of policies in public schools.

***Roles of HoD and MEC on policy development and implementation***

"*What are the roles and responsibilities of the Members of Executive Council and Head of Department of Education at provincial level?*" Politicians responded as in Table 4.9 below:

**Table 3:9 Roles of HoD and MEC on policy development and implementation**

| | Roles of MEC | Roles of HoD |
|---|---|---|
| **A** | The MEC determines provincial policies for education based on National policies | The Head of the Department is responsible for the management of the department of Education and ensures that policies determined at provincial legislature are being implemented by the principals at school level. |
| **B** | MEC is apolitical head of the Provincial Department of Education | The HoD is an implementer of the policies set out by the MEC and ensures that the vision of the department is achieved. |
| **C** | To motivate all theeducation stakeholders to perform their tasks effectively and efficiently | They focus on the implementation of provincial educationpolicies |
| **D** | To develop policies and strategies that can enhance the provision of quality education at provincial level. To carry the mandate of the political party that deployed him or her on such strategic position. | To appoint the personnel such as district senior manager, principals and educators in terms of applicable national and provincial legislatures. |

In South Africa, a provincial legislature is the legislative branch of the government of a province. The provincial legislature is unicameral and varies in size from 30 to 80 members, depending on the population of the province. Each legislature is chaired by a Speaker and a Deputy Speaker. The roles of Member of the Executive Council and that of the Head of Department of Education are described in the jobdescription. I posed the question with the intention of finding out the expectations of different stakeholders in education on the provision of quality education. Participants A to D described the MEC as a political head of the Department of Education in the province, whose responsibility is to develop provincial policies, develop strategies that can enable policy implementation to achieve the institutional goals and also to inspire, guide and motivate personnel in the Department of Education to excel in their respective positions in the department. The HOD is responsible for the management of physical, financial and human resources for the effective implementation of education policies as described at National and Provincial education policies. The appointment of personnel at provincial, district, circuit and

schools is in the hands of the Head of Department. The performance of all the above-mentioned procedures is to be done in line with the relevant legislation. It is evident from the literature study that the MEC for Education in Limpopo Province did not perform his duties as expected. Cabinet had to institute corrective measures by invoking Section 100(1)(b) of the Constitution to resolve the material weaknesses in five Limpopo provincial departments: the Provincial Treasury, Education, Roads and Transport, Public Works, Health, and Social Development. Cabinet deployed a National Executive Intervention Administrative Team to Limpopo to institute emergency measures and ensure that the Provincial Treasury and the provincial government are able to exercise proper financial management, ensure fair and transparent procurement, and deliver appropriate services at the correct costs to the people of Limpopo. The MEC for Education was left with no power to execute financial management functions.

The intervention yielded good results but with other unresolved cases still pending. Cabinet therefore approved the transition of the intervention from Section 100(1)(b) to Section 100(1)(a). This means that the MECs of the affected provincial departments resumedfull executive powers to run the departments and the accounting officer role reverted back to HODs of the respective departments. The concurrence of the National Council Province (NCOP) is being sought in terms of Section 100 (1) of the Constitution. Cabinet has also given clear conditions that the Provincial Executive will have to fulfil as a pre-requisite for determining complete withdrawal.

### Roles of governance managers in the implementation of education policies

 "*What is your participation in the development of the mandatory policies by the SGBs in public schools?"*The governance managers play an important role in the induction and training of the school governing body in the execution of their duties as stipulated in SASA. All three governance managers at district indicated that they were assisting SGBs in the development of the school-based mandatory policies at school. They also made follow-up visits to check if policies complied with the applicable legislation or not. Recommendations for amendments of the school-based policies were given in the form of feedback of their findings during school visits.

The governance managers responded as in Table 4.10 below:

**Table 3:10 Role of SGBs on implementation of education policy development**

|   | YES/NO | WAYS OF PARTICIPATION |
|---|--------|----------------------|
| **A** | Yes | I participated indirectly as I organise induction for newly appointed SGBs and give them guidelines on how to develop mandatory policies. |
| **B** | Yes | I organise workshop for them on how to develop policies and distribute the national acts where their policies from which their school policies can be derived. |
| **C** | Yes | I assist the SGBs when I do school visit. I developed a checklist for the minimum requirements for each mandatory policy for example admission policy. |

*Views of school managers in the implementationof school-based policy*

The research question was "*Which groups of people participated in the development of the above-mentioned school-based policies?*" Different groups of people at school participate in the development of school-based policies. The majority of the school managers revealed that educators, principals, school management teams and SGB members were the usual participants in the development of school-based policies. Participant J responded "principals only". The response may suggest that there are schools in which the development of all policies rests on the shoulders of the school manager. The participation of other stakeholders in that situation seems non-existent . In such situations, one may doubt the effectiveness of the implementation, as those policies are not the product of the implementers. The content of those policies may be unpleasant to other stakeholders in a way that can cause a feeling of discomfort and unwillingness to implement them. The school managers responded as in table 4.11 below:

**Table 3:11 Participants in the implementation of school-based policy**

| | |
|---|---|
| **A** | Identified educators, members of SGB, parents for ratification of policies |
| **B** | SGB, Teachers, Parents |
| **C** | SGB, SMT |
| **D** | Educators, SMT, SGB representing the parents |
| **E** | All stakeholders, parents, educators, we don't involve learners as primary school |
| **F** | Teachers, SMT, SGB and parents |
| **G** | Principal and some SMT members |
| **H** | Educators, principal and School Management Team |
| **I** | SGB, SMT |
| **J** | Principal only |

### *Views of educators on the implementation of current policies*

 "*What are your roles in the development and implementation of current education policies?*" Seven out of ten educators did not take part in the development of school-based policies. Three educators participated but not to the maximum. One may assume that they were consulted only to ratify that which was already in place, drafted by the principal. Most educators are implementing education policies formulated by other stakeholders and they may develop negative attitudes in implementing them. All educators agreed that the existing policies were relevant to the current education system but needed amendments in some of the sections or sub-sections. The educators responded as in Table 4.12 below:

**Table 3:12 Views of the governance managers on the relevancy of the current policies**

| A | Yes, I participated as member of the SMT. I think some policies are still relevantbut some need amendments to address the current educational needs |
|---|---|
| B | No. I read and sign the final documents of some policies during staff meetings. |
| C | No. They are still relevant |
| D | Yes. In some policies I participate. I was part of the draft stage in one of the meetings. Policies are still relevant in current education system |
| E | No. Some are still relevant |
| F | No. Some were just read to us during staff meeting. They are still relevant |
| G | No. Some are relevant and some need amendments. They are still relevant |
| H | No. Some arerelevant |
| I | No. Those developed after 1994 are still relevant |
| J | Yes. I was once requested by the principal to draft HIV & AIDS policy. Some are still relevant but others need changes here and there. |

### *The roles of labour relations managers on policy implementation at district level*

 "*What is your job-description as Labour Relations Officer at district level in relation to education policy implementation?*" Two of the three labour relations managers described their job-description in general terms. It revolves around maintaining good working relationships between employer and employees. Participant B went on to indicate the core activities she is engaged in daily, namely investigating allegations of educators' misconduct and compiling reports or evidence that may lead to charges against such educators. It is evident that Labour Relations Managers are aware of their responsibilities of ensuring that education policies such as LRA, SASA, PFMA, and EEA76 of 1998 are adhered to. (Refer to Table 4.13 below.)

**Table 3:13 The roles of labour relations officers in policy implementation at district level**

| A | To ensure that there is compliance to all education policies such as PFMA, LRA, SASA, EEA at district, circuit and school level. To ensure that there is peace and harmony |
|---|---|

| | between the employer and employee at district and school level. |
|---|---|
| B | Our duty is to investigate the reported cases of misconduct by schools or any anonymously person. We take them as allegations compile the report if there is evidence we recommended that the employee be charged refer or quote the Acts. |
| C | To ensure that the relationship between the employer and employees is healthy for the delivery of quality service to the public in general. |

### *The roles of curriculum managers on policy implementation at district level*

"*What are the major roles and responsibilities of the District Curriculum Managers in the provisioning of quality education in public schools?*" The implementation of CAPS was central to all the participants. Monitoring the supply of LTSM, allocation of human and physical resources, assessment, progression and promotion are part of the District Curriculum Managers' responsibilities.

**Table 3:14 The roles of curriculum managers on policy implementation at district level**

| | |
|---|---|
| A | To ensure that the LTSM are distributed to all schools on time; curriculum advisors workshop all the educators on curriculum implementation; to draw samples of lesson plans and to set the assessment programmes for all schools; to set common tasks for the Co-ordination of delivery of LTSM ; support educators & train them in the implementation of curriculum policies. |
| B | Subjects being taught well methodologies being followed syllabus followed. Training for new things that are there subject committees. |
| C | To make sure that learning does take place in all public schools. Profiling the educators and advising them to use relevant methods. |

### *The roles of the district finance manager on policy implementation*

"*Briefly discuss your roles and responsibilities as District Finance Manager*". Finding and provision of quality education have a close relationship. The District Finance Manager has been assigned the responsibilities of managing the state funds in accordance with PFMA, SASA and 2011 prescripts for the management of school funds in Limpopo Province (Refer to Table 4.15 below).

**Table 3:15 The roles of the district finance manager on policy implementation**

| A | Okay my roles-finances of district expenditure, purchases, procurement, assets demand |
|---|---|
| B | Control overall finance; authorise expenditure, enforce departmental policy<br>Overall control of district finances |
| C | To transfer funds to schools, pay Honorarium of food handlers. Collect Revenue for the departments, implement 3 years MTF budget plan, Disposal of assets |

### 3.6.3   THEME 3: Relationship between policy makers and implementers

The transmission of policy into practice is more complex than the government's part of policy development. There are serious and somewhat neglected issues about whether, and how, national policy can be effectively implemented locally and what needs to be in place for this to occur. Identifying and delivering "early wins" and demonstrating where the innovation is working well helps to build credibility and buy-in, and enables staff service users and stakeholders to learn from experience. Reflecting upon the overall implementation process during the final stages of implementation allows implementers to identify strengths and weaknesses that occurred during the process so as to inform and improve future applications.

Public policymaking process is predominantly the responsibilities of the politicians in consultation with the affected stakeholders. It has to follow several steps prior to its implementation by the education managers. Implementation of policies takes place after policy adoption. A policy alternative is adopted with the support of a legislative majority, consensus among agency directors or a court decision. It can be done at national, provincial, local or institutional level such as a school. On the other hand, policy implementation is the encompassing actions carried out by the public or private individuals or groups (Cloete and Wissink 2000:166) Policy makers are politicians, whereas policy implementers are managers and employees of the Department of Education. Top-down and bottom-up perspectives in policy implementation have much to do with policy makers and implementers.

*Communication between policymakers and policyimplementers*

*The researcher's question was "Which communication systems between policymakers and policyimplementers are in place?"* One of the four managers agreed that there is a close

relationship between policy makers and implementers. Three were of the view that policymakers work in isolation without consulting the implementers at grassroots level. Lack of communication and co-ordination of all stakeholders may impact negatively on the effectiveness of policy implementation. Participants A-D responded as in Table 4.16 below.

**Table 3:16 Relationship between policy makers and implementers**

|  | Yes/No | Communication systems |
|---|---|---|
| **A** | No | Politicians just decide on policies without consultations on the grass roots and expect other government employees to implement their decisions. |
| **B** | Yes | Politicians comes from their constituency and they listen to the needs and demands from the communities they represent. They participate in parliamentary debates pursuing for the achievements of what the people at grass roots are in need of. |
| **C** | No | Politicians are working in isolation without consultation of the affected stakeholders such as school managers and educators who are main implementers of policies at schools. |
| **D** | No | There is no effective communication or consultation between policy makers and implementers and most policies are not relevant to other institutions or environment . |

*The impact of communication on the implementation of policies*

Effective, on-going communication is critical in motivating staff, overcoming resistance to change, and giving and receiving feedback. It is also essential for building and maintaining trust among staff. Internal systems and processes that support effective communication are therefore vital for education institutions. Monitoring and evaluation are essential to determine whether desired indicators are being met and outcomes achieved. Such activities also help to identify risks to implementation and inform future actions. Appropriate reporting and review mechanisms must be in place to facilitate this process.

The government machinery is made up of three parts:

  A. the elected members (legislatures) – who represent the public, approve policies and laws and monitor the work of the executive and departments;

B. the Cabinet or Executive committee (executive) – who co-ordinate the making of policies and laws and oversee implementation by the government departments;

C. the departments and public servants – who are responsible for doing the work of government and account to the executive. Therefore, links or co-ordination amongst all role players is essential for effective implementation of the policies.

Government has the responsibility to make policies and laws about the rights and responsibilities of citizens and the delivery of government services. Government collects revenue (income) from taxes and uses of this money to provide services and infrastructure that improves the lives of all the people in the country, particularly the poor.

In the top-down rational model of policy, implementation puts more emphasis on control and compliance. According to the model, successful implementation of a policy depends on clearly defined and understood goals, readily available resources, a chain of command which is capable of assembling and controlling resources, and a system that is able to communicate effectively and control the individuals and organisations involved in the performance of tasks (Writer 2003: 213). Clarity in the communication of policy is one of the important factors for successful implementation of policies. Complex implementation structures may delay or cause divergence from the envisaged goals of such policy. Vague language and multiple goals may frustrate implementers in the prioritisation of tasks they should perform. Communication between province, district, circuit and schools may contribute towards the effective implementation of policies. The researcher asked "*Which communication system amongst circuit managers, school managers and district officials do you think can enhance the implementation of education policies in public schools in the Limpopo Province?*" Three managers suggested communication means such as telephones, internet access, departmental vehicle for the transportation of circulars to schools and advocacy meetings prior to the implementation of policies at school. One manager understood the question differently from the others when he reported that a link between government levels is essential in service delivery, although the type of link was not specified. Refer to table 4.17 below:

**Table 3:17 The impact of communication on the implementation of policies**

| | |
|---|---|
| **A** | The use of email may fast -track the flow of information. A government vehicle must be available for the delivery of circulars to schools without internet access. |
| **B** | Installation of phones and internet to all public schools. Advocacy meeting for newly developed policies and amended policies to school managers and educators may assist. |
| **C** | e-mails – each school must have e-mail address, gravel road<br>Internet- Rural area cannot access the facilities<br>Inter and intra-not at schools |
| **D** | There must be a link between one level of government to another to ensure that there is service delivery by all civil servants. |

### Educators' access to education policies in public schools

*"Are you able to access the following policies in your school?"* It was clear that the majority of the educators have no access to education policies although they are expected to implement some of such policies. School managers are not promoting participatory decision-making and teamwork in public schools. The roles of the School Management Team and those of the educators are not clearly defined to all stakeholders within the school community. The vision and mission of the school as an organisation is not communicated or shared. The availability of policies at schools seems to be only for compliance, not for implementation and curriculum delivery. One may conclude that the implementation of most education policies is likely to be unsuccessful. Educators responded as in Table 4.18 below:

**Table 3:18 Access of educators to education policies at school level**

|  | A | B | C | D | E | F | G | H | I | J |
|---|---|---|---|---|---|---|---|---|---|---|
| **National Assessment Policy** | No | No | Yes | No | Yes | No | No | No | Yes | No |
| **School Assessment Policy** | No | No | Yes | No | Yes | No | No | No | Yes | No |
| **HIV and AIDS policy** | No | No | Yes | No | No | No | No | No | Yes | No |
| **Safety and security policy** | No | No | Yes | No | Yes | No | No | No | Yes | No |
| **Language policy** | No | No | No | No | No | No | No | No | Yes | No |
| **Religious policy** | No | No | Yes | No | No | No | No | No | Yes | No |

### 3.6.4 THEME 4: Challenges facing education managers in policy implementation

Different challenges are experienced by education managers in the implementation of education policies. Summarising the role of government in language policy implementation in Zimbabwe, Mtenje (2008:30) contends that among the factors that contribute towards failure to implement a language policy is the absence of a strong political will among African leaders to genuinely promote and develop African languages to appreciable levels, in agreement with research findings in the modern world. In the same way, the will of the ruling party in South Africa serves as a yardstick for the implementation level of the education policies. The transition from the pre-apartheid era to the democratic era requires commitment and readiness to implement changes in the Department of Education both nationally and provincially. A study by James and Jones (2008) on school administrators and teachers confirmed that uncontained feelings, especially anxiety, led to high levels of resistance and to failed implementation. The working conditions of school managers and educators should therefore be conducive for the provision of quality education. Education managers at various levels are policy implementers. I asked questions with the aim of identifying the possible problems encountered during the policy implementation stage.

*"Briefly discuss the challenges facing provincial, district and circuit education managers in the implementation of education policies"*. Politicians who participated in the study identified the

following challenges facing provincial education managers: amalgamation of several education departments during pre-democratic era into one system of education, tribalism, destructive criticism from the opposition political parties, and poor communication between stakeholders. District challenge ranges included the distribution of too many circuits that are too far from each other within the district, understaffing of the districts, political demarcation of districts with many ethnic groups and municipalities, inequitable financing of schools. Schools with many resources have a good chance of attaining high academic performance. The major factors affecting the implementation of policies at circuit level include, but are not limited to, appointment of school managers on the basis of locality without considering qualifications and experience. There are loopholes in Resolution number 1 of 2008, which regulates the appointment of post level one educators and filling of promotional posts for a period of twelve months or more. Lack of empowerment workshops for school managers in the area of policy implementation is also contributing to failure. Participants A-D responded as in Table 4.19 below:

**Table 3:19 Challenges facing education managers in policy implementation**

|  | **Challenges at province** | **Challenges at district** | **Challenges at circuit** |
|---|---|---|---|
| A | The amalgamation of several Department of Education as there was during the apartheid era. | The large number of circuits in one district makes it difficult to monitor the implementation of policies. | The overload of the circuit managers makes it impossible to visit principals and School Management Team to monitor policy implementation |
| B | The issue of tribalism is a serious challenge in Limpopo. | The same problem also exists in a district . | The appointment of school managers on the basis of locality or "home child" |
| C | Opposition parties sometimes influence managers to be against the policies of the ruling party irrespective of their good results. | The district municipalities borders are difficult to manage. | Schools in most rural areas do not perform well as schools in urban areas. |
| D | Poor communication with the education stakeholders hinders the effective implementation of policies. | The same problem of communication also occurs at district level. | Lack of empowerment workshops for principals and educators. |

### 3.6.5    THEME 5: Strategies that can enhance effective policy implementation

Successful policy implementation requires compliance with stated directives and goal achievement of specific success indicators and improvement in the political climate around a programme (Hill and Hupe 2006:75). Successful implementation of education policies that were developed with the aim of implementation of the education system will require certain conditions to be met. I sought to identify challenges that require some action to be taken for improvement on the implementation of education policies.

*Measures to promote effective implementation of education policies*

Each province exists in its own environment context that requires specific intervention strategies for the successful implementation of education policies. In 2008, Wandersman and colleagues identified three factors that influence implementation in practice, including individual characteristics, organisational factors and community factors. In terms of the individual characteristics, they argued that there are key variables associated with implementation, including practitioner's education, experience with the same or a similar innovation, and attitude toward the innovation or the motivation to use it. In terms of organisational factors, they linked a variety of organisational characteristics to successful implementation, including: leadership; programme goals/vision, commitment and size; skills for planning, implementation, and evaluation; climate, structure, and innovation-specific factors such as access to information about the innovation; and organisational support for implementation. Suggestions on measures for improvement may therefore be relevant when all these factors are taken into consideration.

The researcher posed this question: "In your opinion, what measurers can be taken to promote effective implementation of education policies by leaders and managers?" Managers suggested the factors that could enhance policy implementation as follows: the top-down model of policy formulation prevents the school managers and educators from giving inputs or identifying challenges. The induction and continuous workshops on policy matters may be a tool for effective policy implementation. Consultation and communication amongst all education stakeholders on the aims and objectives of each education policy may serve as vehicle for effective policy implementation. The response of participants may be compared with that of the

authors on policy implementation, which can be summarised as follows: be clear about the problem; work with the wider system; stay close to implementers; stay focused and use ministers to drive progress (Wandersman 2008). Participants A-D responded as in Table 4.20 below:

**Table 3:20 Measures to promote effective implementation of education policies**

| | |
|---|---|
| A | The down-top formulation of policies may assist. The school managers must be given an ear as they are the implementers of the policies and they have first-hand experience in working with learners, parents and communities |
| B | The effective and efficient consultation during development and implementation stage may assist in common understanding of such policies. |
| C | Leaders and managers must receive induction and follow-up workshops as they execute their work at all levels. |
| D | The department must improve communication system within all structures of management and heavy disciplinary actions must be taken against all who violate policies or fails to comply as on their job-descriptions. |

It is evident that the key measures that may be taken to promote policy implementation include factors such as the policy development model, i.e. top-down to be changed to bottom-up model; consultation during development; common understanding; induction and follow-up workshops; improved communication, and heavy disciplinary actions against those who violate the policies. The views of the managers can only be useful if they are brought to the attention of the senior managers and law enforcement agencies for consideration.

### *The role of circuit managers in monitoring the implementation of policies*

 *"How do you monitor the implementation of education policies in public schools?* Monitoring is one of the management tasks of the manager. Circuit managers are entrusted with the responsibility of monitoring the implementation of education policies by school managers and educators in public schools. The question posed to circuit managers was to find out ways and means that have been put in place to ensure effective implementation of policies. Three circuit managers indicated that they had developed a checklist for the availability of education policies at schools but it is becoming difficult for them to evaluate the level of implementation. The reason behind the failure to monitor is their daily workload. One of the circuit managers

indicated that their focus was on curriculum delivery as their performance was measured in National Assessment. Two of the circuit managers were of the view that governance-based policy monitoring is the expertise of the Deputy Manager Governance located at circuit offices. One may conclude that there is a need for Governance Managers and circuit managers to draw annual plans for monitoring and support to all public schools within their area of jurisdiction. Refer to able 4.21 below:

**Table 3:21 The role of circuit managers on monitoring the implementation of policies**

| A | Request management to give you policies & Acts related to governance and management. To check records of case handed, who reported the case, whohandled it, where are the SMT & SGB minutes on resolutions taken during the meetings. |
|---|---|
| B | We have labour personnel who is checking the availability of policy e.g. Equity act, we check it at school level. |
| C | Monitoring instruments/tool/complete/checklist |
| D | We are not monitoring about that. We focus on curriculum delivery. If we receive good results, school well run, we assume that they follow policy. We refer to policies when there are crisis |
| E | It is not my area of performance but sometimes I assist school managers with challenges. |
| F | I sometimes monitor but my focus is on curriculum delivery. |

*Monitoring quality of school managers' mandatory reports by circuit managers*

"*How do you monitor quality and compliance of the school managers' submission of the following mandatory reports to circuit office?*" Circuit managers responded as in Table 4.22 below:

**Table 3:22 Monitoring quality of school managers' mandatory reports by circuit managers**

| | |
|---|---|
| **A** | There is no fixed monitoring tool as the standards are not set for them. |
| **B** | It is difficult to compare things which are not in one template. |
| **C** | Not implemented, available/only for compliance (submission to circuit office dates of implementation not followed) |
| **D** | Principals display lack of understanding of the policies. Most of reports are done only for compliance. |
| **E** | The template for monitoring each submission is given when circular is released to schools |
| **F** | It is not easy to monitor quality but most principals do comply on submission. |

Circuit managers seem to have common tools for monitoring compliance to the submission of mandatory reports by school managers. A checklist and circuit annual plan caters for dates for submission of such reports. Specific criteria or guidelines are set for each mandatory report. Participant C complained about school managers who do not submit reports by due dates and those who submit merely for compliance without taking into account the quality of such report. Participant C added that most of the reports were not aligned to the policies that regulate them. It seems as of the reports are not serving the purpose they were designed for.

### Challenges facing educators in the implementation of policies

When pushing forward policies for implementation, it is often forgotten that implementers have attitudes about the agenda being propagated by the policy. The difficulties faced by education managers in implementation need to be identified so as to understand their proficiency in executing their duties.

"*Which challenges are your educators facing on the implementation of the above-mentioned education policies?* Briefly discuss." This question was addressed to educator union representatives who normally play the mediatory role between educators and school managers when they are in dispute. I expected them to mention practical experiences of challenges they attempted or managed to solve when representing their members. The unions' representatives exposed cases such as unfair implementation of the Employment Equity Act (Act 55 of 1998),

educators with higher qualifications than their school managers undermining their authority in policy implementation, and too many loopholes in handling misconduct and the implementation of disciplinary procedures. It is evident from scholars like Mtsweni (2008) that after the banning of corporal punishment in schools, most educators feel incapacitated and helpless in dealing with learner indiscipline in schools. Learners are believed to have now become ill-disciplined to the extent that they even openly challenge teachers' authority because they know that nothing would be done to them (Masita 2008). The Act (DoE, 1996a) among other issues clearly defines the specific roles of the educators in South African schools. One of these roles is 'Community, citizenship and pastoral role', in which the educator is required and expected to uphold the constitution and promote democratic values and practices in schools. This implies that in whatever way educators operate, they should not violate the constitution when disciplining learners. These kinds of environment may limit educators' competence in curriculum delivery. (Refer to Table 4.23 below) .

**Table 3:23 Challenges facing educators in the implementation of policies**

| | |
|---|---|
| A | Challenges that educators from abusive legislation is that have knowledge of what that legislation requires of them. Educators are not willing or due to laziness or not having interest they don't even visit the ELRC handbook and they don't study if and have no knowledge. As unions, we call knowledgeable people to address them. Challenges are still there |
| B | We uncounted challenges when people do not want to comply. The one giving challenges: EEA (3 women must be shortlisted) – incompetent) % less that 10% different, loop holes, we don't have problem in competent women, but we must not compromise quality leadership. |
| C | EEA – is not practiced in a correct way. In primary schools, male principals must be appointed. More female principals are needed at secondary school, 3 female and males must be shortlisted for interviews in promotional posts (HOD, Deputy and Principals) |
| D | Managers who do not read the legislation are difficult to convince. |

### 3.6.6 THEME 6: Relationship between education policies and quality education

The aims and objectives of each education policy set the parameter in which the education system can be improved for the provision of quality education to South African citizens. I was interested in evaluating whether the policies are being implemented at the effectiveness level for which they were designed. The aims and objectives of the selected education policies were analysed in comparison with the quality of education in public schools.

*The impact of current education policies in the provision of quality education*

"*Based on your own understanding of quality education, do you think the current education policies are enhancing the provision of quality education in public schools?*" Two of the four managers expressed the view that the current education policies are not enhancing the provision of quality education. The fact that the system is producing grade 12 learners who cannot read, write and numerate to the expected level is evidence that current policies are not implemented effectively to give the expected results. Participant B expressed a feeling of doubt on the judgment of the relevancy of policies to quality education. Participant A quoted SASA as one of the education policies that is implemented well. The participation of parents in the education of their children is visible through the governance responsibility of the School Governing Body where parents should be in the majority of the representatives. The teaching approach that calls for the support of parents in homework and projects of the learners was initiated by SASA and clearly defines the relationships amongst educators, parents and learners. (Refer to Table 4.24 below)

**Table 3:24 Relationship between education policies and quality education**

|   | Yes/No | Brief motivation |
|---|--------|------------------|
| **A** | Yes | The SASA focus on the involvement of parents in the education of their children. Some parents assist learners with home works and buy LTSM to support the curriculum needs and thus enhance good learner performance. |
| **B** | Partly Yes | There are schools that are implementing policies and achieving good learner performance whereas some schools are dysfunctional |
| **C** | No | Generally speaking there is no provision of quality education in Limpopo. This is evident in Grade 12 results where we are outnumbered by many provinces. There are learners who are ion grade 12 who cannot read or write. |
| **D** | No | Limpopo and South Africa as a whole is rated number last in SADC countries. Our children cannot compete with those of our neighbouring countries such s Zimbabwe and Mozambique. |

*Parental involvement in education*

I wished to find out from Governance Managers if parental involvement was yielding the desired outcome in the provision of quality education in public schools. Not all participants were satisfied with the role parents are playing in the education of their children. When asked, "*In your opinion, is parental participation in the education of their children at the expected standard in public schools? Briefly motivate your answer*". The participants responded as in Table 4.25 below:

**Table 3:25 Parental involvement in the education of their children**

|   | Yes/No | Brief Motivation |
|---|--------|------------------|
| **A** | Not exactly | Only 40% of parents participate. The majority of them give excuses that they are at work and leave all the responsibility on the hands of the educators. |
| **B** | No | Not fine but we are getting there, principals must report to SGB & parents in the manner in which learners are performing. |
| **C** | No | Parents are reluctant to come to school when their children need special attention or corrective measures. |

It is evident from the findings that there is a lack of parental involvement in education in public schools. The majority of those parents who attend parents' meetings show a lack of knowledge

regarding current educational matters. I observed that parents who are educated dominate parents' meetings and leave the majority of the parents passive, adding no value to the provision of quality education to their children.

### 3.6.7   THEME 7: The relationship between funding and provision of quality education

*Guidelines, regulations or procedures for the management of funds*

The question was "*What are the guidelines, regulations or procedures for the management of funds?*" The management of school funds differs from school to school based on the category in which the school belongs. It is evident that section 20, section 21, no-fee and fee-paying schools have general, as well as specific procedures or guidelines on the management of school funds. The procurement procedures differ, as section 21 status gives powers to the SGB to procure goods and pay for services on their own. (Refer to Table 4.26 below)

**Table 3:26 The guidelines, regulations or procedures for the management of funds**

|  | PARTICIPANT A | PARTICIPANT B | PARTICIPANT C |
|---|---|---|---|
| **3.1.Section 20 schools** | Like an association or union | Schools are to follow procurement procedures as on provincial guidelines | Big schools have more funds then small schools. |
| **3.2.Section 21 schools** | On behalf of our client, school affiliate to section 20 Shortage of books | Schools may pay for services such as security and levies. | Finance committee is responsible for all payments |
| **3.3. "No fee" schools** | - Primitives given to school monitor<br>- Have evidence | Must spend money as per minimum requirements. | Schools must follow provincial prescripts for financial management |
| **3.4. "Fee" paying schools** | Not that much of restrictions on expenditure as they raise funds. | Can draw their own financé policy guided by PFMA | Can appoint teaching and support staff. |

*Provision of free educationin public schools*

The Constitution of South Africa, Act 108 of 1996, and policies such as NEPA and SASA have been developed to enable all South Africans to have access to free quality education. My question was "The provision of free quality education for all is embedded on the Constitution of the Republic of South Africa, Act 108 of 1996). How best can you rank the implementation of this policy in public schools in the Limpopo Province? Participants responded as in Table 4.27 below:

**Table 3:27 Relationship between funding and quality education**

|  | RANKING | CHALLENGES AND HOW TO ADDRESS THEM |
|---|---|---|
| **A** | Very low | Too many, stake holders is causing delays in the implementation of learner improvement strategies. Accountability of all stakeholder teachers prepared, learners must be ready to learn, motivate them. Free education-funding . The provision of NSNP. Scholar transport offered special school |
| **B** | Average | There is no quality education in South Africa, Schools that perform better are those that charges school fees, have enough funds to here additional educators. Free but not of good quality. All children must go to public schools- free education but not quality education. Matric learners cannot compete with those from well-funded schools e.g. free houses are not of good quality. |
| **C** | Average | Teachers who are not trained may notteach content in good manner. Drastic changesare frustrating educators and they do not have adequate knowledge of the changes to be implemented. |

There is no equal distributionof resources and free education in public schools of Limpopo Province. These historically disadvantaged areas lag behind the previously more advantaged areas. Matomela (2006:10) reports that in some cases learners still walk as far as 20 km to school and have to bring their own water. Among the teacher unions, there is a general impression that the provincial departments of education are neglecting these schools. The Departments of Education supplies little transport for the learners, they do not train members of governing bodies (Maluleka 2008) for their tasks, the feeding schemes are inadequate or inconsistent, and

the lack of infrastructure (such as electricity and new textbooks) at schools does not receive adequate attention. Renovation programmes are far behind schedule (Mbeki 2006:5).

### 3.6.8 THEME 8: The roles of stakeholders in the provisioning of quality education

*The roles of circuit managers in the provision of quality education*

One of the roles of the circuit manager is to ensure that there is implementation of education policies by the school managers, educators and school governing bodies. According to NDoE (2012), the roles of the circuit manager are to formulate policy for operational reasons; analyse policy; implement policy; monitor and evaluate policy implementation; provide guidance to institutions on policy formulation and promote and support policy implementation in education sites.

 *"What are the roles and responsibilities of circuit managers in the provisioning of quality education in public schools?"* Management of curriculum delivery in all public schools is one of the responsibilities of the circuit manager. Provision of basic education is embedded in the constitution of RSA, Act 108 of 1996 (RSA, 1996d). Table 4.28 details specific activities of the circuit managers in their efforts to monitor and give support to principals and educators on curriculum delivery.

**Table 3:28 The roles of circuit managers in the provisioning of quality education**

| | |
|---|---|
| A | The role of circuit manager is to ensure that teaching is taking place at schools. He or she close that by check some learners books, advise the management on his observations checking records by SMT and principals. |
| B | Roles & circuit manager is through curriculum- correct curriculum is delivered-NCS-Venda 12, English 10 but educators not providing according to policy by both educators and principals |
| C | Education that from people to access career |
| D | To guide principals. Principals meetings – Discuss curriculum issues quarterly meetings called. Accountability meetings – Principals present and we identify shortcoming and then guide, support them to improve results |

| E | To give support to principals so that they can manage schools effectively well. |
|---|---|
| F | To monitor implementation of education policies by educators and principals. |

The National Department of Education is responsible for monitoring the implementation of the norms in terms of section 8 of the National Education Policy Act, 1996 (No. 27 of 1996). The DoE is required to undertake its monitoring and evaluation role "in a reasonable manner, with a view to enhancing professional capacities in monitoring and evaluation throughout the national education system, and assisting the competent authorities by all practical means within the limits of available public resources to raise the standards of education provision and performance".

*The management tasks of the school manager*

My question was "*What are the management tasks of the school manager in public schools?*" The management tasks of the school managers are planning, organising, leading and control. All school managers revealed that they were aware of the management tasks they had to perform and they listed the same tasks, although some expressed in other terminology. Participants responded as in Table 4.29 below:

**Table 3:29 The management tasks of the school manager**

| A | Planning the activities of the school. Ensure that sub-ordinates are well organised. Delegation of tasks to sub-ordinates and evaluate the progress of each educator. |
|---|---|
| B | To manage educators, to manage the resources infrastructure human resources. |
| C | Planning; leading; controlling and organising |
| D | Planning, Leading ,Organising, Controlling and Evaluating |
| E | Planning, Organising, Control, Leading, Co-ordinate, Staffing, Financing |
| F | Co-ordinating, delegating, organising, decision-making, policymaking and implementation. Planning is the laying of activities to be done in a year or many years. Planning can have long term and short term goals. The managertherefore delegate task to subordinates to do the work and the manager must monitor, control or evaluate the work done over a certain period. |

| G | Planning, organising, evaluating, leading, control. |
|---|---|

### *The roles of the educators as classroom managers*

The roles and associated competences for educators as described in NDoE (2012) are: learning mediator; interpreter and designer of learning programmes and materials; learner, administrator and manager; scholar, researcher and lifelong learner; community, citizenship and pastoral role; assessor and learning programmes, subject discipline, phase specialist. educators can practice teaching if they are members of the South African Council of Educators. SACE has developed policies on professional conduct and competencies of the educators.

The policy describes the roles, their associated set of applied competencies (norms) and qualifications (standards) for the development of educators. It also establishes key strategic objectives for the development of learning programmes, qualifications and standards for educators. The roles and associated competences for educators as expressed by SACE are: The educator is a learning mediator, interpreter and designer of learning programmes and materials; learner, administrator and manager; scholar, researcher and lifelong learner; community, citizenship and pastoral role; assessor and learning programmes/subject/discipline/ phase specialist.

 *"What are the roles and responsibilities of educators in public schools?"* Educators are classroom managers whose responsibilities are curriculum delivery, administration duties as well as extra-mural activities. They are employed under EEA, Act 76 of 1998 and are expected to implement education policies in and outside the classroom. The implementation of CAPS is their core responsibility. Teaching and learning as well as assessment must follow the guidelines and procedures as set out in relevant policies. Discipline in the classroom must be maintained through the implementation of SASA. It is mandatory for the School Governing Body to develop a code of conduct for learners. The code of conduct for educators has been set out in SACEA,

ACT 2000 of 1995. The response of educators may be summarised in two areas, i.e. teaching and classroom management. Educators presented their general roles and responsibilities as outlined by the EEA, SASA and SACEA. Participants responded as on Table 4.30 below:

**Table 3:30 The roles of the educators as classroom managers**

| A | To teach and manage classroom |
|---|---|
| B | To plan; to lead learners, to mark learners work ; to organise the class |
| C | To teach, take care of learners |
| D | To teach learners, to manage the classes. Ensure the discipline of the class, to ensure that the class in clean |
| E | To teach learners |
| F | To teach and lead learners |

### 3.6.9   THEME 9: Recruitment of education managers and district-based personnel

*Role of HRM in recruitment of personnel in the Department of Education*

The recruitment efficiency and effectiveness of personnel at district, circuit and school level may impact either positively or negatively on the implementation of education policies. Post provisioning, capacity-building and conditions of service for education managers were the centre of focus on the interview schedules. Legislations resolutions and procedures have been put in place for the recruitment of personnel at all levels of education management. Recruitment structures or committees have been established and policies developed for constant implementation of resolutions in respect of advertisement, formation of short-listing and interview panel, recommendation and appointment of education management personnel. Anarchy, intimidation and nepotism have characterised the filling of promotional posts in South Africa since 1994. The inherent promotions of key union members to management positions

have led to a decline in the motivation and dedication of academically and professionally deserving teachers. The undue influence of teachers' unions seems to play a major role in the filling of promotional posts in schools.

The filling of promotional posts in South Africa has been marked by controversy since the advent of the newly formed democratic government in 1994. This happened despite regulatory measures in the form of circulars 42/2006, 43/2006, 47/2007 and 55/2008 of the Gauteng Provincial Government and the Employment of Educators' Act 74 of 1998 (EEA). The above circulars indicate the role of teacher concerns that a new culture of entitlement to management positions among key union members has therefore been created when promotional posts are advertised and eventually filled.

Redeployment is the term that has been used by the ruling African National Congress (ANC)-led government when placing loyal party members to management and cabinet positions. SADTU is an affiliate of the Congress of South African Trade Unions (Cosatu), which forms part of the tripartite alliance with the ANC. Several SADTU leaders have been appointed to senior government positions. A few examples are Mr Duncan Hindle, the former SADTU President and former teacher with an honours degree in education, who became the Director General of the Department of Education (DoE) in 1994, the highest office in the education ministry. Another former primary-school principal and past SADTU President, Mr Membathisi Mdladlana, became the Minister of Labour while the former Secretary General of SADTU, a teacher himself, Thulas Nxesi, became a cabinet minister in government. There are scores of senior positions within the DoE, including district and school management positions, that have been filled by key SADTU leaders. As a result, there seems to be a tendency by teachers to get themselves fully involved in union work instead of spending more time in class in order to be rewarded with promotions. This leads to teachers neglecting their core responsibilities in the school, thus retarding learners' progress.

Gershwin Chuenyane (City Press 11 June 2009) reported on 8 June 2009 that SADTU-affiliated teachers who form 96 percent of district 12 of the Gauteng Department of Education (GDE) embarked on a strike for two full weeks. Gauteng is one of the nine South African busiest provinces. The reason for the strike were that the GDE District Director refused to endorse the

appointment of two candidate principals who were SADTU preferred and redeployed members. Although the GDE explained to the union that it was the responsibility of the School Governing Body (SGB) to recommend such appointments, teachers refused to teach. There are scores of other former SADTU officials who still occupy senior positions in government. Ironically, these same officials are tasked with ensuring that the filling of promotional posts at all levels of the DoE structures is not marred by acts of political nepotism. It is a huge challenge for the appointments of such individuals. Maluleke (1998:6) says that some of these managers are more politically correct than suitable for their posts.

Section 3.2.1(d) of the Collective Agreement No. 2 of 2005 of the LRA states that there should be one union representative that assumes the observer role during redeployment and promotions. By means of this study, I wished to determine if the union representatives indeed become observers or assume other roles contrary to the provisions of the collective agreement.

Some unions violate the rules by placing friends for positions long before they are advertised. For instance, when they know that a principal is about to retire, strategically they have someone reserved for that position. In so doing, they do not consider the curriculum and leadership needs of the institution. They want to influence the SGB by bringing their lists of people to take over the positions. (Zengele and Pitsoe 2014:338)

The researcher asked :"*Briefly discuss the recruitment criteria and procedures for circuit and school managers."* The recruitment of circuit managers must be in line with the Personnel Administrative Measures (PAM) document. The appointment of school managers is regulated by resolution 1 of 2008, EEA, 76 of 1998. The competency of circuit and school managers may impact positively or negatively on the delivery of quality education to all learners. The appropriate recruitment of personnel is therefore vital for effective service delivery. The Human Resource Managers described the Acts and procedures to be followed for the recruitment of both circuit and school managers. The majority of them indicated that Circuit Managers' posts are political. The resolutions signed by employer and educator unions are merely adhered to in theory, but practically, the appointment of circuit managers is done in terms of political affiliations or membership in SADTU or COSATU affiliates. The document analysis revealed that on the circuit managers' profiles very few have postgraduate diplomas and degrees. The

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majority of them do not have even a diploma with management courses. The profiles of their former schools had a trend of being dysfunctional for three to five consecutive years. It is clear that nepotism, comradeship and tribalism have taken their toll in recruitment. The implementation of education policies and research responsibilities of circuit managers could not be functional when the incumbent had produced not even a single mini-dissertation in his or her years of schooling. (Refer to Table 4.31 below)

**Table 3:31 The recruitment criteria and procedures for circuit and school managers**

| | SCHOOL MANAGERS | CIRCUIT MANAGERS |
|---|---|---|
| A | Resolution No 1 of 2008 school level process requirements | Posts are advertised on provincial level and the selection, interviews and appointments are finalised by the ruling political party at provincial level. |
| B | We are using resolution no. 1 of 2008. We do sifting; let SGBs choose panels, do short-listing and interviews. | Recruitment- Circuit Manager is confined at province (Head office) The District Senior Manager is part and parcel of the panel. We just capture final data and work on the Persal System to accommodate those appointed circuit managers. The HoD has final say on appointment of school and circuit managers. |
| C | HR does not play major role on the appointment of school manager. But we participate on sifting post before they go to circuit | A minimum of seven years teaching experience and REQV 13 servers as the basic criteria for appointment as circuit manager. That is the reason why some are appointed without senior or postgraduate degrees. |

The researcher further asked the Human Resources (HR) to explain how best they allocated posts to educational institutions. The question was: "Briefly discuss the post-provisioning model for the educators and educator-learner ratio in primary and secondary schools."I sought to understand the classroom environment in which the educator is expected to deliver quality education to the learners. The ratio of 1:30 and 1:40 for secondary and primary schools respectively seems to be only on principle. My observation was that there are primary and secondary schools that are catering for 50 to 70 learners in the same class. The implementation of CAPS and individual teaching is no longer practicable. The quality of teaching and learning is

being compromised and so too the quality of education in public schools. (Refer to Table 4.32 below.)

**Table 3:32 Post-provisioning model for the educators in Limpopo Province**

|   | Post-provisioning model | Educator-learner ratio |
|---|---|---|
| A | It is done on provincial level we do only the requisition of post. | 1:30 for primary school. 1:35 for secondary school |
| B | It is done on provincial level. We apply for posts as district and the province will decide | 1:35 for both primary and secondary schools except for multi-grade classes. |
| C | Actual creation of post is done at provincial level and we just submit the needs from the schools under our jurisdiction. Permanent promotional posts are advertised on provincial closed vacancy list. | 1:40 for primary schools and 1:35 for secondary schools but this is not the reality in some public schools. We have a situation where one educator is teaching more than sixty learners in one class group. |

### 3.6.10  THEME 10: Empowerment of personnel in the Department of Education

The transfer of knowledge, skills and values to education leaders and managers is a pre-requisite for their effectiveness in the delivery of quality education in public schools. Building staff capacity is a core component of implementation and is pivotal in ensuring that the desired outcomes are achieved. Careful staff selection, quality training and on-going coaching and assistance are all crucial in building capacity in staff for effective implementation.

*Capacity building for education leaders and managers*

Educators should be trained in all areas of their delegated responsibilities according the Employment of Educators Act, 1998 (Act 76 for 1998). According to the Skills Development Act, 1998 (Act 97 of 1998), its purpose is eight-fold, namely to develop the skills of the South African workforce; improve investment in training and development and increase return on investment; encourage employers to develop learning environments, as well as provide opportunities for employees to acquire new skills; encourage employees to participate in learnerships; improve the employment opportunities of individuals from previously disadvantaged backgrounds and generally to improve their skills base; ensure and control the quality of training in the workplace; help jobseekers find work and employers to identify potential employees and regulate employment services.

Education managers should be inducted and receive several workshops as they render service to the Department of Education as employees. The Labour Relations Act and Skills Development Act make it possible for education managers to receive work-related training and in-service courses to keep them up to date. Curriculum changes and amendments in other education legislation call for the education manager to become a lifelong learner. I wished to know the kind of support the school managers are receiving from the circuit, district and province on the implementation of policies. The questions were: *"Do you have capacity-building programmes for leaders and managers in respect of labour policies? How far are you with the implementation of capacity-building programmes? What are the challenges you are experiencing during and after the workshops?* The Labour Relation Officers responded as in Table 4.33 below:

**Table 3:33 Role of labour officials in capacity building of leaders and managers**

|   | Yes or No | Progress on capacity building programmes | Challenges during and after workshops |
|---|---|---|---|
| A | Yes | We do induction of newly appointed managers | Lack of finance leads to very short and ineffective workshops. Our department is our administration and most programmes came to a halt due to lack of funding. In 2013 we inducted the newly appointed school managers only. |
| B | No | Capacity building is the expertise of the Human Resource Management section but we feature in terms of disputes or grievances lodged by employees | Although were are not responsible for training of employees the problem we experience is the inefficiency of personnel of which we can associate with inadequate knowledge of their work. |
| C | Yes | Programmes are there but it is difficult to implement because of financial constraints. | Poor implementation of policies and poor performance in carrying out their duties and responsibilities. |

The newly appointed personnel must be equipped with the knowledge on how best they can execute their roles and responsibilities. Personnel capacity building can be enhanced through the implementation of Skills Development Act, (Act 97 of 1998). The purpose of the Skills

Development Act is eight-fold, namely to develop the skills of the South African workforce; improve investment in training and development and increase return on investment; encourage employers to develop learning environments, as well as to provide opportunities for employees to acquire new skills; encourage employees to participate in learnerships; improve the employment opportunities of individuals from previously disadvantaged backgrounds and generally to improve their skills base; ensure and control the quality of training in the workplace; help jobseekers find work and employers to identify potential employees and to regulate employment services. The questions below about induction and capacity-building programmes are therefore relevant to the Human Resource Managers.

### *Induction of newly appointed personnel in education department*

Teacher induction continues to be a topic of profound relevancy. Darling-Hammond (2006), among other researchers, underscores the fact that teachers' abilities contribute most significantly to student achievement and educational improvement (see also Cochran-Smith 2006). Effective teacher induction programmes are instrumental in terms of both new teacher retention and in strengthening pedagogical practice (Fulton *et al* 2005; Smith and Ingersoll 2004).

Induction of newly appointed managers is a pre-requisite for the Department of Education. Recruited personnel must be orientated to the field of work, the expectations of the department, and its aims and objectives, vision and mission must be communicated to all its employees. The induction of district circuit and school managers may form the basis or foundation of the knowledge and expertise needed for the implementation of education policies geared towards the provision of quality education to all public schools. The questions were "*Do you have induction or training programmes for newly appointed circuit managers? How are you implementing the capacity-building programmes in your district? In terms of circuit and school managers' performance, are you satisfied with their knowledge of the legislation? Briefly explain.*" Two Human Resource Managers confirmed that induction of newly appointed circuit managers is done shortly after the appointments. They disclosed that there are no follow-up workshops to capacitate the circuit managers. Participant B shifted the responsibility to the governance section, especially on the implementation of SASA in public schools. It is evident that circuit managers

are left to experiment for themselves. All the participants rated the knowledge of the circuit managers in policy implementation as inadequate. One may assume that because of lack of education policy knowledge, their supervisory responsibilities to the school managers may not be effective. (Refer to Table 4.34 below.)

**Table 3:34 Induction of newly appointed personnel in education department**

|  | PARTICIPANTS A | PARTICIPANTS B | PARTICIPANTS C |
|---|---|---|---|
| **4.1. Induction** | Yes, Once (indication) shortly appointment workshops on specific items. | Once as induction after appointment workshops are conducted by province on particular topics or challenges | It is done by governance section e.g. school finance management. |
| **4.2. Capacity building** | We communicate through circulars an d we organise workshops for specific topics or challenging areas. | There is no capacity-building programme. We normally discuss challenging issues during the meetings or intervene when there are crisis in a particular schools. | We are failing to follow the plan because of lack of funding from the province. |
| **4.3. Level of knowledge** | No | No | No |
| **4.4. Brief explanation** | They know only the basics and we need to go further for details so that they can implement them. | Most circuit managers are running schools by common sense. We observe this when there are crisis at school. | Some circuit managers have knowledge but they are not communicating it to school managers. |

*Capacity building programmes for leaders and managers*

Leaders and managers must have leadership and management skills for the effective management of their institutions. Labour Relations Officers may empower circuit and school leaders and managers on labour laws and policies. "How are you participating in the induction workshop and other training on policy implementation?" Three labour relations officers, one from each of the sampled districts, responded as in Table 4.35 below:

**Table 3:35 Capacity building programmes for leaders and managers**

|   | Yes or No | Progress on capacity-building programmes | Challenges during and after workshops |
|---|---|---|---|
| **A** | Yes | We do induction of newly appointed managers | Lack of finance leads to very short and ineffective workshops. Our department is our administration and most programmes came to a halt due to lack of funding. |
| **B** | No | Capacity building is the expertise of the Human Resource Management section but we feature in terms of disputes or grievances lodged by employees | Although we are not responsible for training of employees the problem we experience is the inefficiency of personnel of which we can associate with inadequate knowledge of their work. |
| **C** | Yes | Programmes are there but it is difficult to implement because of financial constraints. | Poor implementation of policies and poor performance in carrying out their duties and responsibilities. |

It is evident that there are capacity-building programmes in two districts but they are not implemented to the latter. Financial constraints in terms of the departmental budgets prevent the labour relations officers from implementing their capacity-building programmes. Participant B shifted the responsibility of conducting workshops to the Human Resources Manager. The mandate of the district managers in empowering the personnel in institutions under their jurisdiction is not fulfilled according to requirements of the Skills Development Act.

*Training on the implementation of Curriculum and Assessment Policy*

A new policy introduced on 27 April 2007 seems to address the above concerns. The National Policy Framework for Teacher Education and Development deals extensively with how SACE should carry out its mandate of professional development of teachers (SACE, 2007). This piece of legislation introduces the concept of Continuing Professional Teacher Development (CPTD) as the new system that SACE will manage and implement. Its main duty focuses on assuring quality of professional development activities by endorsing service providers and their activities,

monitoring delivery of the programmes through feedback from teachers, and by appointing quality assurance bodies to undertake formal monitoring and evaluation on its behalf.

According to the Constitution of South Africa (Act 108 of 1996), as well as a White Paper on Education and Training (DoE, 1995a:40) (a policy document that preceded the promulgation of the National Education Policy Act of 1996), education and training are basic human rights. The National Education Policy Act (Act 27 of 1996) states that the Minister of Education may determine national policy for education, including policy for the provision of support services in areas such as health, welfare, career and vocational development, and counselling and guidance. The different provincial departments of education should provide these services to learners and educators in order to ensure effective education and training as fulfilment of the basic human rights requirement.

Educators need differentiated support services to equip them holistically. According to Steyn and Wolhuter (2008:8-9), support services to the educator include those non-educational services required to optimise the work of the educator and to help him/her solve problems that could impede his/her effectiveness as teacher/educator. The following are typical examples: subject advisory and professional services, educator research services, communication services and teacher associations.

"*Did you receive training on the implementation of the Curriculum and Assessment Policy? For how many days were the workshops? Do you think the knowledge acquired was adequate to implement CAPS?"* I was specific on the curriculum-related policy that must be implemented for the provision of quality education. The educators provided diverse responses in a focus-group interview as in Table 4.36 below:

**Table 3:36 Training on the implementation of Curriculum and Assessment Policy**

| | |
|---|---|
| A | Yes, 2 days<br>No 4 is not enough |
| B | Yes, 3 days, yeas because it was not for first time to attend |
| C | Yes, 2 days only<br>No not adequate information |
| D | Yes – CAPS – 2 days<br>No – Knowledge was not adequate |
| E | Yes, some weeks, may be 3 weeks not adequate<br>Training for at least three years or more may be sufficient |
| F | Yes, 2 days only |
| G | Yes, 2 days only |
| H | Yes, some weeks |
| I | Yes but it was for one day only. |
| J | No. The workshop was programmed during holidays but did not materialise |

It is clear that the training or workshops received by educators were not adequate and effective. It seems as if all workshops conducted were in the form of advocacy meetings and did not provide intensive or in-depth study of the expected curriculum delivery by the educators. There is great possibility of failure in the implementation of the new curriculum approach as educators will struggle with the methodology and content gap in teaching new concepts.

*Impact of capacity-building of school managers*

Capacity building ensures that stakeholders keep abreast of policy development and programme status. Furthermore, it ensures that reviews are made in the implementation approaches and training requirements, thereby avoiding duplication of efforts. However, capacity building is a

time-consuming activity in terms of uplifting stakeholders' level of knowledge to own and manage their own services (Baku and Agyeman 2002; Barnes and Sekpey 2006). It is significant for school managers to have a basic and general understanding of all the South African parliamentary education legislation and policies with particular emphasis on the South African School Act, 1996 (Act 84 of 1996). This is what I regard as the cornerstone that provides life to the education system. At the same time, deep understanding of these legislations and policies ensure social security and humanity dignity. The capacity-building programmes should always be part of the education system to strengthen and improve personnel performance.

*"Were you capacitated in the understanding and interpretation of education policies?"* Six of the ten school managers had not received training on policy matters. It is evident that there is a need for intensive training on the aims and objectives of each education policy. Participants responded as in Table 4.37 below:

**Table 3:37 Impact of capacity building for school managers**

| PARTICIPANTS | YES/NO | LEVEL OF BENEFITS |
|---|---|---|
| A | No | I did not receive any induction or workshop |
| B | No | I don't even remember any day |
| C | No | Not at all |
| D | Yes | But not all of them. In some policies e.g. SASA, LRA, EEA. E.g. We benefited from such workshop |
| E. | Yes | I attended two days induction session shortly after my appointment. |
| F. | Yes | There was a project called Khanyisa which capacitated us on the understanding of policy, how to co-ordinate policies and how to interpret them. The department just workshop us partially only on areas where they experience many problems e.g. the use of leave days for educators. |
| G. | Yes | I attended workshops under Fhatuwani project. It was not organised by the Department of Education by the NGO. I was amongst the chosen few who participated in that project. I |

| PARTICIPANTS | YES/NO | LEVEL OF BENEFITS |
|---|---|---|
| | | benefited as we were taught how to run our schools effectively for better results. |

*The effectiveness of educators' capacity building programme*

The researcher's question addressed to educator union representatives was "*What are your roles in the empowerment of educators in the implementation of education policies?*" The intention was to find out if educators have adequate knowledge of education policies or not. One cannot implement something one has no or inadequate knowledgeable of. I expect the educator unions to empower their followers on legislative matters as preventative measures towards committing offences. The responses of the union representatives were similar as they all indicated that they were not executing such responsibilities to their members. They were only responsive when a crisis arose and when defending their members in cases of misconduct. One may conclude that failure to implement policies may be caused by lack of knowledge of the policies. (Refer to Table 54.38 below.)

**Table 3:38 The effectiveness of educators' capacity-building programmes**

| PARTICIPANTS | YES/NO | IMPACT OF CAPACITYBUILDING |
|---|---|---|
| A | No | We are much far behind on capacitating our educators. We were banking on the Education Labour Relations they received from SACE. Our experience taught us that educators do not give themselves time to read those Acts and policies and as a result they find themselves charged of misconduct. |
| B. | No | We normally discuss about salary issues and good working conditions we expect from the employer. |
| C. | No | Educators are not capacitated on policy matters. They only seek advice when there are disputes or charges of misconduct. |
| D. | I may say partly Yes | We sometimes invite personnel from labour sections to deal with challenging sections of the education policies but this is done once in a while. |

### 3.6.11 THEME11: Understanding of labour policies in relation to educators' misconduct

Educators are classroom managers. They are expected to monitor observance of the code of conduct of learners, implementation of curriculum policies and all school-based mandatory policies developed by the School Management Committee as well as the School Governing Body. The educators' understanding of education policies may impact positively on the provision of quality education to the learners. The school manager is entrusted with the responsibility of empowering the educators with the necessary knowledge and skills. The South African Council of Educators Act, 2000 (Act 31 of 2000) and Employment of Educators Act, 1998 (Act 76 of 1998) are the two major Acts governing the performance of educators.(cf. 2.9.8)

*Cases of educators' unprofessional conduct*

 *"What are the cases of misconduct reported to the district office?"* The intention of these questions to the Labour Relations Managers were intended to find out the level of compliance to EEA, LRA, SACEA, PFMA and SASA by the educators. All participants confirmed that such cases of misconduct do exist. Examples of such misconduct include sexual abuse, corporal punishment and mismanagement of funds. One may conclude that EEA, LRA and PFMA have been violated in one way or another. (Refer to Table 4.39 below.)

**Table 3:39 Cases of educators' unprofessional conduct**

|  | Yes/No | Examples for yes answer | Strategies to remedy the situation |
|---|---|---|---|
| A | Yes | Mismanagement of funds | There is a need for intensive financial management workshops for all school managers. |
| B | Yes | Corporal punishment | Drastic steps should be taken against all who commit misconduct and this must be done in public to give signals to other educators who may be practicing corporal punishment. |
| C | Yes | Sexual abuse. Educators having affairs with learners. Sexual harassment, mismanagement of funds, | There is no other way to remedy this problem except heavy fines and dismissal of those who commit misconduct. |

| | | continuous absenteeism from school. | |
|---|---|---|---|

**Non-compliance of school managers on management of school funds**

Education policies at school level were developed to improve the management and governance of schools. The School Management Team is responsible for the day-to-day running of the school. The School Governing Body is responsible for the governance of the school and focuses on the financial management and maintenance of infrastructure as well as the adoption of the code of conduct for learners. There are mandatory policies that must be developed by the School Governing Body. Schools are also at liberty to develop their own policies to manage and govern their daily activities as long as such policies are in line with the national and provincial education policies. I wanted to check whether each structure or stakeholder was playing its role for the provision of quality education at public school.

Certain tasks have priority, and must be undertaken or continued even before the norms and minimum standards come into effect. These are: creating a computerised method of tracking and documenting the targeted allocations and subsidies according to the norms; creating appropriate accounting and financial mechanisms to allocate and track funds in terms of the norms, and to inform schools of their allocations as required by section 34 of SASA; helping SGBs to understand how to advise parents on whether to set fees;calculating the level of fees;determining exemption criteria and procedures; and handling appeals (SASA sections 38-40).

The researcher's question was "*What are the incidents of non-compliance in the implementation of finance policies reported to the district?*" The participants responded as in Table 4.40 below:

**Table 3:40 Non-compliance in the implementation of finance policies**

| | YES/NO | EXAMPLES |
|---|---|---|
| A | Yes | But we so lucky in our district most school do comply, send a circular for compliance certificate, submit to circuit and circuits submit to us. Circuit manager make follow-up through DSM |
| B | Yes | Political friends, defend the educators, when you continue to report causes, you will be fired for such reports, purchase of materials without the proper procurement procedures – strong member of political policy. |
| C | Yes | Principals and educators are receiving kick-backs from the service providers and they can do three quotations from the same supplier with different names. |

*Impact of educators' misconduct on the provision of quality education*

"*How can the cases of school managers and educators' misconduct affect the provision of quality education in public schools?*" I sought to understand the consequences or the extent of damage of educators' misconduct on teaching and learning. The Labour Relations managers responded giving a series of examples of misconduct and the manner in which they can impact on quality education provision. The participants responded as in the Table 4.41 below:

**Table 3:41 Impact of educators' misconduct on the provision of quality education**

| | |
|---|---|
| A | Suspension (when we suspend the manager, for principal, we improvise in absence of principal governing body must act in place of principal but when an educator is suspended, learners will spend many days or months without an educator and thus there will be no curriculum coverage for that period and learners may fail. |
| B | Physical abuse or corporal punishment may increase the drop-out rate. |
| C | Absenteeism causes learners to be behind and fail to finish the syllabus for such grade. Sexual relationship with colleagues and educators effect discipline of the school and thus lead to poor learner performance |

The consequences of misconduct are lack of curriculum coverage by educators, poor learner performance and lack of learner discipline. Average performers need more contact with the educators so that they can achieve good results. The possibilities of failing the formal tasks are

high to slow-paced learners. The provision of quality education to all learners is being compromised and it is against this background that one may conclude that the regulations of the Constitution of RSA, SASA and NEPA are being violated.

### 3.6.12  THEME 12: Provision of quality education in public schools

The major responsibility of the Ministry of Education is to promote quality education delivery in South Africa. This requires adequate resources for the provision of physical facilities, equipment, teaching and learning materials (TLMs), an adequate number of trained teachers, and promotion of gender equity in enrolment and retention, among others. The availability of systems for ensuring the provisioning of quality education and policies developed towards actualisation of the intended education goals will only materialise if the education managers at different levels understand, interpret and implement such policies correctly and effectively. The circuit managers were requested to evaluate the provision of quality education in public schools within their circuits.

*Perceptions of curriculum managers on quality education*

Managers at different management levels may perceive quality education differently as some authors do. Hoy *et al* (2004:17) view quality education as an evaluation of the processes of education that enhances the need to achieve and develop. The main objectives of the education policies developed after 1994 was to improve the level of education provision in all public schools. I was interested in measuring the provision of quality education as perceived by managers. The satisfaction or dissatisfaction with the quality of education provision may enable us to evaluate the impact of education policies in regulating the provision of quality education.

The same question was forwarded to different managers at different education management structures but worded differently. The purpose for this question was to check if all managers have the same understanding of what quality education is all about. The differences in opinion may mean the difference in focus area of achievements in terms of policy implementation. The question to Curriculum Managers was "Would you briefly discuss the features or characteristics

of quality education?" The Curriculum Managers sampled from three districts responded as in Table 4.42 below:

**Table 3:42 Curriculum Managers' views on quality education**

| | |
|---|---|
| **A** | Education that respond to the economic demand of the country<br>Inspired intended learners who can add value to the growth of economy. |
| **B** | Quality education is when a curriculum has been drawn taking into account that which a country need. To produce future managers and leaders of this country.<br>The country's needs must be matched with the output of the universities and colleges. |
| **C** | From my point to yield results that are desired, prepare learners to get into the world of work, product to be promoted by the Department of Education.<br>Enable learners to reach exit level, grade 12 with the necessary skills to sit for tertiary education. |

Quality education is linked to excellent grade 12 performances of learners, producing independent adults who can participate in the socio-economic growth of the country, readiness to fit in the career world, and producing the future leaders of the country. The curriculum managers sharedclosely-related views on quality education. This perception indicates that they are working towards the achievement of common goals in education.

The question directed at school managers was "*How best can you define quality education in terms of the implementation of education policies?*" The school managers responded as in Table 54.43 below:

**Table 3:43 School managers' views on quality education**

| | |
|---|---|
| **A** | From where I am standing, I think quality education is self sufficient in offering best education that can give learners good education. |
| **B** | Must start in the classroom depend on parents, the government itself? Quality education is the best education given to learners at school. |
| **C** | The standard level of the learner where more than 50% obtained pass results |
| **D** | Education given to learners which include adequate resources (LTSM), accommodation well-trained educators and best co-operative learners who can achieve good results. |
| **E** | Fully fledged education –committed in working without supervision, prepare for better career, calling or pastoral mission of serving learners like your biological children. |
| **F** | Quality education is when learners obtain 90 to 100 % pass percentage and obtain bachelors and diploma symbols. We measure quality at the end of the year after summative evaluation. Learners must obtain symbols required at the universities |
| **G** | Education offered by educators who are better qualified, sound content knowledge to deliver to learners so that they can achieve good results and finally occupy careers that can address the need of the community. |
| **H** | Quality education is when learners pass in large numbers and high marks |
| **I** | The best education offer to our learner by educators |
| **J** | The kind of education that can develop the child in totality and become an independent adult who can participate in the economic development of the country |

The key words for the definition of quality education can be summarised as good education; best education; more than 50 percent obtained pass results; good results; obtain 90 to 100 percent pass percentage; occupy careers that can address the needs of the community; develop the child in totality to become an independent adult. The information received from the focus-group interviews shows that educators' perceptions on quality education differ, although they can be summarised as: good education that can produce competent adults who can be part of the economic growth of the country.

### Mechanisms suggested for enhancing the provision of quality education

There is a need to develop strategic plans that may speedup the process of providing quality education to all South African citizens.According to the Constitution of South Africa (Act 108 of 1996), as well as a White Paper on Education and Training (DoE, 1995:40) (a policy document that preceded the promulgation of the National Education Policy Act (Act 27 of 1996), education and training are basic human rights. The National Education Policy Act (Act 27 of 1996) states that the Minister of Education may determine national policy for education, including policy for the provision of support services in areas such as health, welfare, career and vocational development, and counselling and guidance. The different provincial departments of education should provide these services to learners and educators in order to ensure effective education and training as fulfilment of the basic human rights requirement (Mashau *et al* 2008: 146).

Managers at different management levels may perceive quality education differently, as some authors do. Hoy *et al* (2000:10) and Nambe (2004:17) view quality education as an evaluation of the processes of education that enhance the need to achieve and develop the talents of customers, at the same time meet the accountability standards set by clients who pay for the process or the outputs from the process of educating. In the light of the above views, I posed the question on the definition of quality education to education managers at different management levels. The intention was to find out if employees of the Department of Education are working towards the achievement of common goals or expectations. "*Which mechanisms do you think may enhance the provision of quality education in public schools?*" Curriculum managers suggested the strategies as detailed in Table 4.44 below:

**Table 3:44 Suggested mechanism in enhancing provision of quality education**

| Participant A | Participant B | Participant C |
|---|---|---|
| Capacity building on curriculum matters and monitoring by the departmental officials. | Allocation of enough funds for curriculum resources to all schools which include LTSM and educators | Strict adherence to contact time with learners and proper assessment |

The response can be summarised as recruiting competent educators, monitoring curriculum delivery programmes, providing LTSM, curriculum coverage and quality assessment programmes. It is clear that curriculum managers are able to identify those factors that can promote the provision of quality education. The question remains: *How best can managers implement those suggestions for improvement?*

### *Rating the provision of quality education at circuit level*

The development of new policies as from 1994 was geared towards the improvement of education system so that it would produce competent independent adults who could contribute to the socio-economic development of South Africa and the world at large. Reform during the last ten years in post-1994 South Africa has focused on the provision of quality education for all learners regardless of their background or the circumstances in which they live (Smith and Ngoma-Maema 2003:345). The quest for the provision of quality education was heralded by the White Paper on Education and Training (DoE, 1995a) and the Policy Framework for Quality Assurance in South Africa (DoE, 1998). In post-1994 South Africa, the South African Schools Act (Act 84 of 1996) and the Revised National Curriculum Statement (RNCS) changed the education scene, as educators were required to engage learners in meaningful learning activities suitable for a diverse learner population, and implement and assess learner outcomes (Du Plessis, Conley and Du Plessis 2001:106).

Motshekga, as cited in Chuenyane (2010:30), admits that OBE was adopted out of excitement for the democratic era and the fact that its values were attractive and linked to the Constitution; however, the country cannot afford the required resources. The pass rate of grade twelve learners is still used, albeit controversially, as a credible yardstick to measure success or failure of the outcomes-based teaching-learning interaction. Tau and Mathebula (2008) insist that grade twelve results do not match the investment in education; while Maree (2008b) laments that the performance of South African learners is embarrassingly poor, as compared to those from other countries, due to teachers' poor knowledge of subject matter.(cf. 2.15.1 – 2.15.2)

The question was: "*What can be done to improve or maintain the quality of education at schools in your circuit?*" The six sampled circuit managers responded as in Table 4.45 below:

**Table 3:45 Rating the provision of quality education**

| | |
|---|---|
| **A** | Assessment – dates on plan and for assessment parents must know when the child moderation of question papers |
| **B** | Public schools in our circuit are more advanced (they are the best and we provide quality education (School A, School B and school C provide quality education). The child of circuit manager is also attending in public schools as they are productive. |
| **C** | We are trying to move to that level but we have a long way to go. We still have cases of poor performance in our schools. Some educators arenot dedicated andteaching isno longer a calling but job and is done only for money. |
| **D** | Quality is not there – We can receive 75% but no quality, very less Bachelor pass, only 10% out of that 75% receive bachelor. We are still struggling with quality upgrading of qualification can assist to improve results. CAPS need more days for workshops so that educators can master the content. Discipline is also a problem, at secondary school. Governance people must be highly qualified and knowledgeable of educational matters so as to give support to SMT for better education. Principal is doing all the governance & management of the school alone |
| **E** | We are far behind the expected standards but CAPS is leading to improvement |
| **F** | Quality is not there as we have grade 12 learners who cannot read or write. |

The politicians were also requested to evaluate the provision of quality education in their province. The question was "*In your own assessment, how can you rate the standard of provision of quality education in public schools in South Africa and Limpopo Province in particular?*" The four sampled politicians from different political parties responded as in Table 4.46 below:

**Table 3:46 Standard of provisioning of quality education in public schools**

| A | We are partly there but still have serious challenges especially in far rural areas Allocation of resources are not yet on equitable basis. The no fee paying rural schools cannot finance the curriculum to the level of their expectations. |
|---|---|
| B | Our children are receiving very, very poor education. We are good in terms of resources but far behind in terms of performance. Learners cannot read or numerate at the expected levels. |
| C | The standard is better at private schools than in public schools which cater for the majority of our learners. Learners in grade 10 to 12 could not compete well with those of other countries at that levels. |
| D | The standard of quality education provision is very low. We have very good policies but we are unable to put them in practice for attainment of good results. |

Circuit managers evaluated the provision of quality education and arrived at similar or closely related conclusions. The majority of the participants are not satisfied with the standard of education provided in public schools. Learners who are at FET and tertiary institutions are not completing their studies in time and it shows a gap that exists between secondary school education and tertiary education.

### 3.6.13  THEME 13. Monitoring and quality assurance systems in education

*Quality assurance systems in education*

Comparison of the education prior to and post 1994 shows that they seem to be different. The instruments for quality assurance may also differ as the aims and objectives of education approaches differ. "*Do you have quality assurance monitoring systems in place?*"

Curriculum managers responded as on Table 4. 47 below:

**Table 3:47 Systems to ensure quality assurance in education**

| Participant | Yes/No | Implementation of programmes | Challenges during implementation of programmes | Challenges after implementation of programmes |
|---|---|---|---|---|
| A | Yes | We do it on quarterly basis | We are understaffed and fail to monitor many schools | Some educators do not implement what we taught them. |
| B | Yes | I have monthly monitoring programme and have developed monitoring instruments. | We are only 216 in our district and we are only 4 for our subject. We are expected to service more than four circuits with many schools. We are overloaded and cannot ensure quality provision of education | We cannot make follow-up to educators to check if they are doing their work in line with applicable policies. |
| C | Yes | There is a year plan which outlines the daily activities that I must do as a curriculum advisor | Lack of funds and working force. | Request for donations and partnership with NGOs can assist. |

The majority of the curriculum managers revealed that they were overloaded in a manner that makes it difficult to assure the quality of the curriculum delivery in public schools. They indicated that plans of action were available on paper but were not being implemented as the allocated responsibilities were beyond their capabilities. They suggested recruitment of additional curriculum advisors as a quick solution to ensure quality service delivery. The concept of funding was extended to private sectors that could partner with the Department of Education or directly with schools.(cf. 2.10.1 -2.10.5)

*Changes in curriculum and teaching approaches*

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Education prior to and during the post-apartheid era is not the same. The ministers of education as from 1994 produced their own curriculum policies and approaches to enhance the provision of quality education to all South African citizens. These include the introduction of OBE by Minister Sibusiso Bengu, and the Natural Curriculum Statement RNC and CAPS by Angie Motshekga. The implementation of national and provincial education takes place in different environments, some conducive and others difficult for implementation. According to Matlala (2006:78), the complexity of the national-provincial relationship, that is, the implications of fiscal federalism and the specific conditions in education reform were not clearly laid out, presenting enormous difficulties for those responsible for policy implementation at provincial level. I wanted to know the challenges that prevail in both urban and rural public schools in Limpopo Province.

"*How can you diferentiate between CAPS and the past teaching approaches*?" The purpose of the question was to evaluate whether CAPS is a relevant education system for the delivery of quality education. The sampled educators responded as in Table 4.48 below:

**Table 3:48 The introduction of CAPS in the provision of quality education**

| A | RNCS and CAPS are different. The subject content in CAPS is more specific and educators teach according to subject policy and pace setters to all learners. |
|---|---|
| B | Pass requirements (Get Intermediate) 50% Home Language (FET-English = 40% subject content moved from one grade to another. Maths = 40. All learners must pass Maths |
| C | Not the same. CAPS is more specific, not generic<br>CAPS comfortable/educators |
| D | CAPS describe the content for each grade and is easy to follow and educators are happy with CAPS then NCS. The content is the same but specific for each grade. There is a slight change in content |

Educators were able to differentiate between RNCS and CAPS. They shared common aspects such as pass requirements, content or syllabus, role of educator in the classroom as well as the assessment structures and techniques. Classroom-based activities were being done according to the curriculum policies as introduced by the Department of Education from time to time.

*The effect of curriculum changes on quality education*

The researcher's question was "*What are the challenges facing human resource managers in providing educators for quality teaching and learning in public schools?"* The participants responded as in Table 4.49 below.

**Table 3:49 The effect of curriculum changes on quality education**

| A | Drastic changes frustrated educators and some just left learners not fully .supported |
|---|---|
| B | Lack of required LTSM leads to frustrations on the side of educators and learners. |
| C | Progression and promotion requirements are of low standard and learners are no longer competent like before. |

The drastic changes in curriculum are affecting the effectiveness of the implementation of such policies in the provisioning of quality education in public schools. The frustrations facing educators render them incompetent in executing their duties in the classroom situation.

The researcher's question was "Which subjects would you consider as scarce skills?" The participants responded as in Table 4.50 below:

**Table 3:50 Shortage of educators for scarce skills subjects**

| | Scarce skills | Addressing shortage | Future plans |
|---|---|---|---|
| A | Maths & sciences- we are using foreigners. | We are appointing foreigners to assist us | To open college and offer attractive package to the youth for teaching. |
| B | Maths & science – we use the foreigners as we are not enough | We recruit educators from other countries and also do re-training. | To open in service training centres to retrain teachers on scarce skill subjects. |
| C | Maths & Science- They have added the subjects as scarce – Life Science, English, Geography before 1996. | Over the past years the system is receiving foreigners for these subjects. | To open the educator training colleges in all the provinces. |

Maths and Physical Science are regarded as scarce skills and the Department of Education in Limpopo Province is outsourcing from the neighbouring countries like Zimbabwe.

*The implementation of curriculum changes by educators*

Educators are curriculum policy implementers at grassroots level. They are in direct interaction with the learners who should receive quality education in public schools. Policy implementation is viewed asa complex activity and the teacher is regarded as the most important agent in ensuring successful implementation (Ndawi and Maravanyika 2011:70). According to Matoti, Jangueira and Odora (2011:140), teachers therefore need to develop capacity that enables them to make intelligent decisions in order to handle ambiguous and challenging situations when teaching. This view is pursued by Eslami (2008, cited in Matoti *et al* 2011:141), who argues that it is crucial to understand teachers' beliefs about their own effectiveness, known as teacher efficacy, as it helps to explain many instruction decisions that they make.

The same view is advanced by Matoti, Junqueira and Odora (2011:1143), who assert that self-efficacy, or belief in one's capability to do the job, is vital in ensuring teacher quality because educational research has established that there is a link between a teacher's perceived self-efficacy and his or her potential effectiveness in the classroom. Matoti, Junqueira and Odora assert that if a teacher believes that he or she is capable of managing his or her classroom and conducting meaningful lessons, he or she is most likely to proceed as perceived. For example, the teaching of Mathematics is a challenge to most of the schools.

The child's foundational knowledge and skillsacquired form the basis for success in the learning of Mathematics in the higher grades (Reddy, Van den Berg, Janse van Rensberg and Taylor 2012:108). These authors suggest that failure to teach learners Mathematics effectively at thefoundation level may impact negatively on the learners' performance in subsequent schooling levels. A recent Department of Basic Education Annual National Assessment (DoE, 2012a) showing a Grade 9 National Mathematics average of 13 percent validates this point.

Both the Constitution and the national legislation on education lay the foundation for curriculum differentiation.In its preamble, the South African Schools Act No 84 of 1996 stresses the importance of providing quality education for and upholding the rights of all learners. In the same manner, section 29 (1) of the South African Constitution (South Africa 1996) under the Bill of Rights guarantees the right to education for everyone. Unfortunately in South Africa, the

subject knowledge of educators is found wanting. Wits Education Policy Unit (2005:17) contends that educators show inadequate knowledge, poor grasp of their subject and make errors concerning the concepts and content presented in their lessons. It is against this background that staff development assumes greater importance in attempts to provide quality education to learners. Enhancing the professionalism of educators, therefore, lies at the heart of all efforts to provide quality education.

The proliferation of policies geared towards implementing educational change presented challenges such as choosing between what was desirable and what was possible (Christie 2008). Furthermore, the introduction of such a large number of policies associated with curriculum change have undermined the professionalism of teachers.

Christie *et al.* (2007:87) discovered through research that some primary school learners were promoted to high schools while they were unable to read and write, but very noisy, which had added to the burden of their teachers. OBE has produced learners of uncontrollable behaviour due to this curriculum's emphasis on group work; teachers cannot master the methodology; weak learners are promoted due to the requirement of age cohort progression; and some parents do not have time and/orthe ability to assist their children with school work, one of the requirements of OBE. (Motshekga as cited in Chuenyane, 2010:30).

Educators were expected to compare the pre and post-1994 education systems and identify similarities and differences that may exist. During focus-group discussions the educators came up with the contributions in Table 4.51 below:

**Table 3:51 The implementation of curriculum changes by educators**

| A | Men and women are treated the same way at work places |
|---|---|
| B | We do not have enough classrooms |

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| | |
|---|---|
| | No enough resources for all subjects<br>No libraries<br>No laboratory for experiments<br>No facilities for extra-mural activities |
| **C** | Numerous challenges are there safety, salaries are not okay. Revise scale to enable me to have about 15000 per month |
| **D** | Yes. Some challenges exists at school<br><br>Use of finances (Norms and Standards laws are right, we cannot clean the yard<br><br>  - No security<br>  - Overloaded classes educator –learners ratio<br>  - No discipline of learners as they are not disciplined at home |

A list of challenges could be extracted from the responses of the participants. It is clear that the implementation of education policies and delivery of quality education are being hampered by many factors such as inadequate funding, infrastructure shortages, lack of human resources, poor discipline of learners, poor working conditions for educators, and passive participation in extramural activities.

### *The impact of curriculum changes on the provision of quality education*

 *"Different teaching and learning approaches have been implemented from 1994 to date. They range from Outcomes-Based Education, National Curriculum Statement, Revised National Curriculum Statement and Curriculum and Assessment Policy Statement. How did these different approaches contribute to the current quality of education in public schools?"* Curriculum Managers were expected to evaluate the outcomes of each curriculum policy, the similarities, differences, successes and limitations of each policy. All policies are to be accessed based on their impact on the provision of quality education as envisaged in the constitution of the Republic of South Africa. The Curriculum Managers responded as in Table 4.52 below:

**Table 3:52 The impact of post-apartheid curriculum changes**

| | |
|---|---|
| **A** | Better quality education is provided. |
| **B** | At least most learners can access education with ease |

| C | Current teaching methods cater for learners' diversity and are user friendly. |
|---|---|

*Reading and numerating audit in public primary schools*

The quality of education may be judged by the reading and numerating levels in their specific grades. Baatjies (2003:1) states that the most important element of high quality education is literacy and that without the ability to read, learners are denied pertinent information about health, social, cultural and political issues, as well as sources of pleasure and enrichment. Reading is important for learning as it gives learners independent access to a vast world of information as well as fulfilment and enjoyment (Gunning 2007:3). The national Department of Education (DoE) acknowledges that reading is part of nation-building and that it is the most important linguistic skill that needs to be developed in young learners (DoE 2008a:5).

The researcher's question was: *"How do you conduct reading and numerating audit to identify the challenges facing educators and learners in this regard?"* The participants responded as in Table 4.53 below:

**Table 3:53 Reading and numerating audit in public primary schools**

| | |
|---|---|
| A | School attendance – Checking and sharing what the principal submitted (tally)-cheating by principals. APIP- schools underperforming do it for compliance, no improvement at all no implement. |
| B | Maths improvement- Grade 3 ANA no problem, grade 6 and 9 we struggle in Maths, English is better. |
| C | I do. Every time when I visit primary school (once per week) school visit form. Ja, is like but not that much changes exist |
| D | Yes, when I visit schools, but call teachers for reading/numerating feedback and let children read. Daily mantel in Maths. There is improvement in mental mathematics |
| E | Yes. when I visit schools I request for report from the principal. |

### 3.6.14  THEME 14: The management and governance of public schools

*The changing role of the principal*

What is basic among the school governance challenges is the capacity of the school governors to govern. While the provincial departments of education, through functional units at head offices and at district levels, have engaged in the training of school governing bodies (SGBs), the actual enactment of these roles is often less than ideal (Tsotetsi, Van Wyk and Lemmer 2008:385). It is also noteworthy that the Schools Act prescribes a rather ambiguous role for the principal. According to Section 16(a) of the Education Laws Amendment Act, 2007 (Act 31 of 2007), two of the functions and responsibilities of principals of public schools are stated as follows: The principal of a public school represents the Head of Department (HoD) in the governing body when acting in an official capacity and he or she must assist the governing body in the performance of its functions and responsibilities, but such assistance or participation should not be in conflict with stipulations of the Department of Education.(cf. 2.9;  2.9.7)

The implementation of policy depends on policy design, implementation strategy, commitment and capacity of the bureaucratic system, and the environmental factors. It also depends on factors such as availability of money and other resources, on geographic considerations such as tensional function, and on sociological factors such as interpersonal work relationships. Key influences within the policy implementation are actors and arenas, organisational structures and bureaucratic norms, and communication networks and compliance mechanisms,on the literature review.

 *"What is the difference between leadership and management?"* The school managers differentiated leadership and management as in Table 4.54 below. The majority of the school managers are able to define leadership and managerial roles they are expected to execute.

**Table 3:54 Difference between leadership and management**

| | |
|---|---|
| **A** | My understanding of the two concepts is that leadership entails the extent to which the leader influences the sub-ordinates to achieve the goals of the institution whereas management is the achievement of identified responsibilities through others who are under your supervision. |
| **B** | Lead by example. Management must have the following documents to manage teachers you need to have policies. |
| **C** | Leaders has followers, leadership (POLC) |
| **D** | Implementation of policies to the status core.<br>Influencing – perform task to maximum |
| **E** | Management leading people to work for you, leadership has to do with visionary, and influencing people |
| **F** | Leadership is the ability to influence others or your sub-ordinates to do the work. Management has to do with routine system governed by rules and policies or guidelines that makes an organisation to operate or becomes functional. |
| **G** | According to me, leadership has to do with leading given people within an institution. A leader has followers who support him in achieving the objectives or goals of the institution, a manger implement policies of an organisation through planning, organising,leading andcontrol. |

It can be deduced from the responses that principals know their roles and responsibilities as leaders and managers of public schools. The four basic management tasks, i.e. planning, organising, leading and control obtained central position in the discussion.

*Demarcation on governance and management tasks*

Leadership is a daunting challenge. Outstanding leadership has invariably emerged as a key characteristic of outstanding schools. Kruger (2003b:4-5) found that effective instructional leadership and a shared sense of purpose are some common characteristics of schools with sound cultures of teaching and learning. According to Ubber *et al* (2007:18), today's principals are charged with the duty of shaping their schools to become outstanding beacons of productive learning. They are challenged to clarify their own values, beliefs and positions and to engage proactively with others in the redesign and improvement of their schools. Ubber *et al* (2007:18) further maintain that principals are expected to orchestrate shared power and decision-making

among an array of individuals both internal and external to the school situation. They are also encouraged to build a community of leaders and learners who will effectively shape the school environment to champion increased productivity among learners.(cf. 2.13.1 – 2.13.3)

In terms of the Employment of Educators Act and Basic Conditions of Employment Act, the employer has a mandate to provide good working conditions to all government employees. The physical, financial and human resources needed must allow for quality education provision. The rights of employees must receive the attention they deserve. I desired to check if the educators and school managers are successful or failing to implement the education policies just because of the unfavourable conditions prevailing in their work situation.(cf. 2.14.1)

The question was "*How can we differentiate between management and governance?*" The responses of the governance managers were almost the same, indicating that structures involved in management and governance are the SMT and SGBs respectively. (Refer to Table 5.71 below.)

**Table 3:55 Difference between governance and management of public schools**

|   | DIFFERENCES | STRUCTURES | CHALLENGES |
|---|-------------|-----------|------------|
| A | SGB Governance, SMT for management | SMT SGB | When people where up with own interest e.g. principal & SGB have different interest on the person to be appointed into a post |
| B | SGB Governance, SMT for management | SMT SGB | Poor demarcation of responsibilities |
| C | SGB Governance, SMT for management | SMT SGB | When one structure abuse its powers and violate the rights of others |

The governance managers were able to differentiate between management and governance and their roles and responsibilities in each section were explained.

*Roles of the School Governing Body*

The democratic governance of the public schools is embodied in the Constitution of RSA (Act 108 of 1996) and in the South African Schools Act (Act 84 of 1996). Education has been declared as a societal issue. President Jacob Zuma, in the state of nation address (Imbizo, 2007) at ICC, Durban, stated that education should be a societal issue, meaning that parents and all community members must take part in the decisions on how to govern and manage schools excellently for the provision of quality education in public schools. School managers and educators may no longer be left alone in their struggle of providing quality education to learners. I sought to evaluate the extent to which the governance managers are monitoring the SGBs in the implementation of the South African Schools Act by paying attention to selected sections that call for their participation. The other essential principles of SASA are**:** eliminating poverty through proper education; establishing a human rights culture to advance the democratic transformation of society;ensuring respect for and protection and advancement of various cultures and languages; andestablishing a partnership between all stakeholders who have an interest in education, i.e. the state, parents, learners, educators and other members of the community in the vicinity of a school (Joubert and Prinsloo 2008:25).

Other research studies have confirmed that many SGBs, especially those in rural and township schools, lack financial expertise. In addition, many cases of alleged financial mismanagement through misappropriation coupled with theft and fraud are being constantly reported (Marishane and Botha 2004; Naidoo 2010). Given the narrow focus of previously disadvantaged schools, Ngwenya (2010) has argued that the lack of financial management skill and commitment on the part of many SGBs has worsened considerably during the past five years. In addition, research conducted by Mestry (2004) and Mestry and Naidoo (2006) has confirmed that many SGBs continue to struggle to maintain financially viable schools. As a result, cases of financial mismanagement and misappropriation of funds are rife. The research conducted by Marishane and Botha (2004) concurs with that of Naidoo (2010) that a number of SGBs lack the financial expertise and knowledge to create financially viable schools. Consequently, most SGBs are inadequately prepared to handle this huge responsibility.

The question was "*In terms of SASA, Act 84 of 1996, which responsibilities have been assigned to the School Governing Bodies in terms of funding, human resource management and the maintenance of infrastructure?*" The governance managers' responses are tabulated below:

**Table 3:56 Responsibilities assigned to the School Governing Bodies**

|  | PARTICIPANT A | PARTICIPANTS B | PARTICIPANT C |
|---|---|---|---|
| 3.1.Funding | Develop finance policy a school to solve problems related to funds | SGB for funding-controls all funds for schools section 21. Open account for school. | Ensure that funds allocated are supplemented by SGB – donation/fundraising school funds are looked after properly |
| 3.2.Human Resource Management | Establish interview committee, elect panellists for short listing inter | SGB does not appoint personnel unless they fundraise for SGB posts. | Establish interview committee, elect panellists for short listing inter |
| 3.3.Maintenance of Physical Infrastructure | Search 20/21 | Maintenance of infrastructure – They do the procurement and maintenance of assets. | For purchase of goods and payment of services. |

## 3.7   CONCLUSION

Chapter Four focused on data presentation. Data collected through interviews, observation and document analysis were categorised into themes and sub-themes. The literature review was used as the starting point for critical analysis of the data, which was aimed at answering the main research question and the sub-research questions. Data was analysed, interpreted and results discussed. The next chapter focused on summary, conclusions and recomendatioons.

# CHAPTER FIVE:
# SUMMARY, MAJOR FINDINGS AND RECOMMENDATIONS

## 4.1   INTRODUCTION

In the previous chapter, the findings of this study were presented, analysed and discussed in detail. The main objective of the study was to find out how education managers in Limpopo Province understand, interpret and implement the selected education policies for the provisioning of quality education in public schools. The research questions were to identify the legislations formulated towards the provision of quality education in South Africa, the roles of as well as challenges facing education managers in the implementation of education policies. The interview questions, literature review and observation were used to collect data addressing the research questions and purpose of the study. The main purpose of this chapter is to present a summary of the results or findings, draw conclusions and come up with recommendations for change and further studies.

## 4.2   SUMMARY OF THE RESULTS

The main purpose of the study was to explore the education managers' roles and factors that may enhance the implementation of education policies at provincial, district, circuit and school level in public schools in the Limpopo Province, South Africa. Chapter 1 introduced the reader to the background of the South African Education system and Limpopo Province Department of Education in particular. The problem statement, which revolves around the understanding, interpretation and implementation of education policies, was discussed. Cases of non-compliance and inadequate support on the implementation of policies for quality education were central to the problem statement of the study. I was motivated to embark on the study with the aim of contributing to the body of knowledge on education policies that may assist education managers to understand, interpret and implement the education policies correctly. The original desire to conduct this study was the underlying assumption that good understanding and implementation of education policies may impact positively on the effectiveness of leadership and management of quality education in public schools. (cf. 4.5.1 – 4.5.14)

I identified numerous barriers against effective policy implementation, which are discussed in the sections below:

### 4.2.1 Knowledge of education managers on education policies

The majority of the participants know the aims and objectives of NEPA, SASA, PFMA, EEA, 76 of 1998 but displays some limitations on other policies. Data collected suggests that curriculum managers are not well conversant with the constitution of RSA in relation to the provision of education. NEPA and SASA are the two education policies where aims and objectives have been clearly defined by the curriculum managers. One may conclude that education managers focus on policies that directly affect their area of operations and do not consult other education policies that can impact on their entire performance. (cf. 2.5.2)

Most finance managers at district level have basic knowledge of the education policies. They do have adequate knowledge of the PFMA and prescripts. One may conclude that their interests are on the education policies relevant to their core areas of work. However, the use of funds on educational institutions must address the expectations of the state which are embodied in NEPA and SASA. Therefore, knowledge on SASA and NEPA is essential to ensure that there is value for money. (cf. 2.5.5- 2.5.6)

Two of the three governance managers have an understanding of SASA and PFMA but know very little about NEPA. One of the participants described NEPA as "Overall Act for many acts and policies, e.g. SASA". This kind of response suggests that the GM does not know the aims and objectives of NEPA. The monitoring role of the GMs in encouraging the SGBs to utilise the funds towards the attainment of the desired goals of the Department of Education could not be achieved if aims and objectives of NEPA are unknown.

The human resource managers (HRMs) seem to have little knowledge of policies applicable to their area of jurisdiction. For example, participant A with respect to the Employment Equity Act (Act 55 of 1998) responded "EEA deals with equity at work place".(cf. 2.5.5). No further explanation on the aims and objectives was given. It can be concluded that there are HR managers who are not acquainted with the applicable legislation that governs their daily

activities on the recruitment and management of personnel. Participant A further asserted, "I am not well conversant with the Employment of Educators Act but I think it controls educators at school". The post-provisioning, selection and filling of educators' vacancies are the competences of HRM managers who must execute such duties guided by applicable legislation and procedures.It could be very difficult to implement something one is not sure of. Competency of human capital, expertise in the specific field and effective implementation of policies may lead to the provision of quality education in public schools.

It is evident from interview findings that the educators' union representative has inadequate knowledge of education policies. It may be challenging to represent educators well in the Education Labour Relations Council (ELRC) or bargaining chambers without the knowledge of the policies.(cf. 2.5.7). EEA describes the appointment of educators as well as their conditions of service. The state of working conditions which may impact on curriculum delivery should be monitored by educators' unions. They should sound an alarm in cases of the failure to provide basic conditions of educators' employment by the Department of Education. One may therefore conclude that the educators' unions are not executing their mandates well. When disputes arise, educators may lose cases and be charged unfairly by their counterparts within the education system.

The majority of educators do not know the basic focus areas of the education policies. "I don't know" is a common response received from educators in respects of aims and objectives of education policies.Other educators just repeated the Act as articulated by the researcher, for example "Labour Relations Act is a relationship between labourers at work places". Lack of knowledge of the expectations of the Department of Education from each policy leaves a doubt whether educators could implement such education policies for the provision of quality education'

### 4.2.2   The role of educator unions on policy implementation

Educators' union representatives responded to the questions about their roles  in more or less the same way. Their roles focused on defending educators in times of crisis or disputes. Participant D further indicated that they represent educators when there are disputes on appointments and

during hearings for disciplinary procedures in cases of misconduct. One may conclude that the responsibilities of the employers are monitored by educator unions. When resolutions are taken in the bargaining chambers, their implementation becomes the responsibilities of both the Department of Education and of the educator unions. When educational changes take place, the educator unions are consulted on the procedures to be followed in implementing such changes. The implementation of EEA and LRA may be effective when the employer and the educator union representatives are well conversant with the content of these Acts.

### 4.2.3   Participation of education stakeholders in policy development

The majority of the school managers revealed that educators, principals, school management teams and SGB members were the usual participants in the development of school-based policies. Participant J responded "principals only". The response may suggest that there are schools in which the development of all policies rests on the shoulders of the school manager. The participation of other stakeholders in that situation seems to be in none-existence. In such situations, one may doubt the effectiveness of the implementation, as those policies are not the product of the implementers. The content of those policies may be unpleasant to other stakeholders in a way that can cause a feeling of discomfort and unwillingness to implement them.(cf. 2.2.6)

### 4.2.4   The role of Labour Relation Officers in policy implementation

It is evident that Labour Relations Managers are aware of their responsibilities of ensuring that education policies such as LRA, SASA, PFMA, and EEA76 of 1998 are adhered to.

The major factors affecting the implementation of policies at circuit level include, but are not limited to, appointment of school managers on the basis of locality without considering qualifications and experience. There are loopholes in Resolution number 1 of 2008, which regulates the appointment of post level one educators and filling of promotional posts for a period of twelve months or more. Lack of empowerment workshops for school managers in the area of policy implementation is also contributing to failure. Lack of planning and empowerement workshops of circuit personnel. (cf. 2.5.7)

**4.2.5    The role of Governance managers in policy formulation and implementation**

One may conclude that there is a need for Governance Managers and Circuit Managers to draw annual plans for monitoring and support to all public schools within their area of jurisdiction. Circuit managers seem to have common tools for monitoring compliance to the submission of mandatory reports by school managers. A checklist and circuit annual plan caters for dates for submission of such reports. Specific criteria or guidelines are set for each mandatory report. Circuit Managers complained about school managers who do not submit reports by due dates and those who submit merely for compliance without taking into account the quality of such report. Participant C added that most of the reports were not aligned to the policies that regulate them. It seems as of the reports are not serving the purpose they were designed for.

**4.2.6    The role of parents in the implementation of education policies**

It is evident from the findings that there is a lack of parental involvement in education in public schools. The majority of those parents who attend parents' meetings show a lack of knowledge regarding current educational matters. I observed that parents who are educated dominate parents' meetings and leave the majority of the parents passive, adding no value to the provision of quality education to their children. Illiterate parent experience difficulties in supporting their children with homeworks. (cf. 2.3.2)

**4.2.7    The role of circuit managers in policy implementation**

The document analysis revealed that on the circuit managers' profiles very few have postgraduate diplomas and degrees. The majority of them do not have even a diploma with management courses. The profiles of their former schools had a trend of being dysfunctional for three to five consecutive years. It is clear that nepotism, comradeship and tribalism have taken their toll in recruitment. The implementation of education policies and research responsibilities of circuit managers could not be functional when the incumbent had produced not even a single mini-dissertation in his or her years of schooling.

### 4.2.8 Provision of quality education in public schools

My observation was that there are primary and secondary schools that are catering for 50 to 70 learners in the same class. The implementation of CAPS and individual teaching is no longer practicable. The quality of teaching and learning is being compromised and so too the quality of education in public schools . One may assume that because of lack of education policy knowledge, the supervisory responsibilities of the circuit managers to the school managers may not be effective.

### 4.2.9 Induction and training of education managers

It is evident that there are capacity-building programmes in two districts but they are not implemented to the latter. Financial constraints in terms of the departmental budgets prevent the labour relations officers from implementing their capacity-building programmes. Participant B shifted the responsibility of conducting workshopsto the human resources manager. The mandate of the district managers in empowering the personnel in institutions under their jurisdiction is not fulfilled according to requirements of the Skills Development Act. It is clear that the training or workshops received by educators were not adequate and effective. It seems as if all workshops conducted were in the form of advocacy meetings and did not provide intensive or in-depth study of the expected curriculum delivery by the educators. There is great possibility of failure in the implementation of the new curriculum approach as educators will struggle with the methodology and content gap in teaching new concepts. It is evident that there is a need for intensive training on the aims and objectives of each education policy.

### 4.2.10 Perception of education managers on the provision of quality education

Quality education is linked to excellent grade 12 performances of learners, producing independent adults who can participate in the socio-economic growth of the country, readiness to fit in the career world, and producing the future leaders of the country. The curriculum managers shared closely-related views on quality education. This perception indicates that they are working towards the achievement of common goals in education.

Circuit managers and politicians evaluated the provision of quality education and arrived at similar or closely related conclusions. The majority of the participants are not satisfied with the standard of education provided in public schools. Learners who are at FET and tertiary institutions are not completing their studies in time and it shows a gap that exists between secondary school education and tertiary education.(cf. 2.6.3)

### 4.2.11 Monitoring and support by circuit magers in implementation of education policies

The majority of the curriculum managers revealed that they were overloaded in a manner that makes it difficult to assure the quality of the curriculum delivery in public schools. They indicated that plans of action were available on paper but were not being implemented as the allocated responsibilities were beyond their capabilities. They suggested recruitment of additional curriculum advisors as a quick solution to ensure quality service delivery. The concept of funding was extended to private sectors that could partner with the Department of Education or directly with schools.

### 4.2.12 Challenges facing school managers and educators on policy implementation

The drastic changes in curriculum are affecting the effectiveness of the implementation of such policies in the provisioning of quality education in public schools. The frustrations facing educators render them incompetent in executing their duties in the classroom situation

A list of challenges could be extracted from the responses of the participants. It is clear that the implementation of education policies and delivery of quality education are being hampered by many factors, such as inadequate funding, infrastructure shortages, lack of human resources, poor discipline of learners, poor working conditions for educators, and passive participation in extramural activities.

### 4.2.13 Leadership and management roles of school managers in poloicy implementation

It can be deduced from the responses that school managers know their roles and responsibilities as leaders and managers of public schools. The four basic management tasks, i.e. planning, organising, leading and control obtained central position in the discussion. The only challenge

leading to ineffectiveness raised was the workload that overburdened them. Lack of adequate remuneration package was a common denominator for all school managers.

## 4.3 CONCLUSIONS

The conclusions were drawn from the related literature reviewed in Chapters Two and the empirical data from document analysis, observations and interviews presented in Chapter four of this study. This research established that many factors are hampering the implementation of education policies and thus contributing to the poor provision of quality education in public schools of the Limpopo Province. Conclusions are presented under each factor below:

### 4.3.1 Lack of knowledge on education policies

Managers hold different views in terms of categories of policies and policymaking process. The majority of managers experience a lack of knowledge and skills in policy development and implementation. Human resource managers, labour relations managers, finance managers, circuit managers, school managers, educators, curriculum managers and educator union representatives have inadequate knowledge of policy matters. It was evident from the data that they were unable to cite the aims and objectives of the selected education policies and it was difficult for them to differentiate the policies in terms of the focus area of each policy. Uncontained feelings, uncertainty, anxiety and lack of knowledge on policy matters leave managers with no choice but to run schools by taking decisions based on common sense. The aims and objectives of the transformational policies cannot be implemented effectively when managers are not acquainted with them.

### 4.3.2 Lack of stakeholders' participation on policy development

Politicians are dominant over other stakeholders in the policy development process. The circuit and school managers, educators and parents are partly consulted through the government gazette when policy is about to be adopted and implemented. These stakeholders are expected to implement policies even if they do not understand them or disagree with most of the sections or sub-sections of the policy content.

### 4.3.3 Inadequate dialogue between policy makers and implementers

Politicians are policy-makers whereas managers and administrative employees of the Department of Education are policy-implementers. It is evident from data collected that policy-makers work in isolation withoutconsultation with policy-implementers. There is lack of communication and co-ordination of all stakeholders at various management levels. A top-down model of policy implementation prevails in Limpopo Province. The aims and objectives of each policy are not communicated and made clear to the implementers at all levels. Departmental circulars are issued to district officials, circuit managers, principals and educators as instructions. There are no guidelines or procedures on the implementation of education policies; hence, there are irregularies during the implementation phase.

### 4.3.4 Perception of education managers on policies and quality education

Education managers have different perceptions on policies and quality education. The majority of the managers did not know the exact aims and objectives of selected education policies in this study. The rationale for the development of each policy could not be attached as the goals, vision and mission of each educational institution is based on the understanding, interpretation and implementation of the national and provincial acts and policies. Education managers'definitions of quality education differed, for example, school managers defined quality education in terms of high learner performance in grade 12 results, politicians focused on equal access to education without an element of discrimination, whereas curriculum managers described quality education as the one that can produce a learner who can match with the social, economic, career needs of the government and the entire world. Policies are therefore perceived as offering opposing outcomes.

### 4.3.5 Incapacity of education managers in execution of their duties

It is evident from the empirical data, literature review, observation and documents analysis that HR, DFM, LRM, curriculum managers, circuit managers, school managers and educators have inadequate knowledge on education policy development and implementation. It was revealed

that education managers assume their duties without being inducted and trained for the effective delivery of their roles and responsibilities.

### 4.3.6 Factors hampering provincial, district and circuit managers on policy implementation

Failure of education managers to implement policies and give support to their sub-ordinates revolve around factors such as amalgamation of several departments of education in the post-democratic era, tribalism, destructive criticism by opposition political parties, labour strikes, understaffing, insufficient funding on policies, and lack of knowledge and skills relevant to the personnel's posts. Improper implementation ofthe Public Finance Management Act and mismanagement of provincial funds have contributed on a large scale to failure to implement education policies in terms of supply of resources and support programmes.

### 4.3.7 Poor monitoring and mentoring on the provision of quality education

One of the roles of managers is to monitor the implementation of policies they have developed at the provincial legislature but a very short period of time is allocated for such responsibility. Circuit Managers complained about their workload and end up focusing only on curriculum delivery grade 12 results in particular. Provincial and district education managers are not working closely with the implementers and not taking regular stock or evaluation of policy implementation. The Integrated Quality Management System (IQMS) is not serving its educator development purpose for quality learning and teaching but only for a one percent salary progression. Quarterly and annual reports are not analysed and no feedback is given to school managers and educators.

### 4.3.8 Inappropriate recruitment of education personnel

The district is understaffed in terms of curriculum managers, labour relation officers, governance managers and office administration personnel. The district is failing to service all its sub-directorate and schools under its jurisdiction. Most district-based education managers have no post-graduate qualifications and expertise in their delegated responsibilities and data revealed that they lack knowledge on policy matters. Districtmanagers are unable to capacitate circuit

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managers, school managers as well as educators who are classroom managers. Most districts are failing to implement the Employment Equity Act, Employment of Educators Act and Labour Relations Act in a way that may enhance the provision of quality education in public schools.

### 4.3.9 Inadequate funding and poor financial management

The member of executive council entrusted with the responsibility of developing policies and implementing them at provincial level failed to implement effective financial management under PFMA and SASA and his powers were taken by the administration delegated by National parliament under section 100(b) as evidence of incompetence in financial policy implementation. The provincial Department of Educationis not providing for the effective functioning the public schools as required by the Republic of South Africa constitution, SASA, PFMA, NEPAand CAPS. There is lack of human and physical resources, more especially at rural public schools. Cases of mismanagement of school funds by educators, school managers and provincial education managers were reported, some of which have not yet been resolved to date.

### 4.3.10 Poor school management and governance

It is evident from the data collected through participant observation and interviews that most School Governing Bodies have inadequate knowledge and skills to govern schools effectively. Lack of financial management skills makes it difficult for the parent component of the SGB members to execute their financial responsibility as described in SASA, Act 84 of 1996. Most school managers are not acquainted with National Education Policy Acts and provincial policies which were developed with the aim of transforming the education system and delivering quality education to all South African citizens.Most school managers are failing to execute their facilitating role in motivating, empowering and monitoringeducators in the implementation of education policies. SGBs and SMTs are unable to draw a clear line between governance and management responsibilities and this leads to chaos and delay in quality education provision in public schools.

### 4.3.11  Lack of strong policy enforcement systems

Provincial education managers charged with misconduct are often discharged on political grounds, as they were deployed by political leaders. Cases of corporal punishment, sexual harassment, educators having affairs with colleagues and learners, alcohol and drug abuse at schools, and mismanagement of funds were reported at provincial and district level but very few cases were finalised and charges laid. The educator unions are overpowering the state, particularly the Department of Education, as the educator representatives in provinces, districts and circuits are taking the lead instead of remaining observers.

## 4.4   RECOMMENDATIONS

The previous sections have discussed key findings on this thesis with relation to the implementation of education policies for effective leadership and management of quality education at public schools. This section is designed to extract the recommendations in accordance with the main research question and the four sub-research questions of this study. The recommendations made in this section are a triangulation of the related literature study, document analysis, observation and interviews constituting the empirical research results. Recommendations are organized in two catergories: Recommendations for change; and recommendations for future research.

### 4.4.1   Recommendations for change

a) A qualification on legislation, policy development and implementation must be a pre-requisite for the appointment of heads of department, district senior managers and sub-directorate managers, circuit and school managers. The deployment of Members of Executive Council for Education (MEC) by the political party should consider leadership and management qualifications and experience. The MEC should serve for a period of five years to ensure that the policy developed at legislature during his or her term of office are implemented in the manner in which they were intended. The language or terminology used in education policies should be simple. The preamble, aims and

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objectives of the policies should be clear and unambiguous. The Department of Education should organise advocacy meetings, seminars and workshops for continuous development of education managers. Aims and objectives of main education policies relevant to each level of management should be displayed on the office notice boards for a continuous reminder and reference when managers engage in their daily routine.

b) A combination of top-to-bottom and down-to-top models of policy implementation based on situational analysis is strongly recommended. The agenda setting stage should be done by parents, school managers and educators at school level. In secondary schools where there are learners' representative councils, learners' voices must be heard prior to the implementation of policies that directly affect them, for example, learners' code of conduct. Policymaking structures should consist of representations from all education stakeholders. The roles and responsibilities of each stakeholder should be defined and a clear demarcation of powers should be drawn. Participatory decision-making must be applied to promote a sense of belonging and to increase the willingness to succeed in policy implementation.

c) Independent policy implementation agents that are entrusted with the responsibilities of monitoring, assessment and support should be appointed by Limpopo Department of Education. Co-ordination of four levels of education management, namely provincial, district, circuit and school, should be the competency of the Independent Policy Implementation Agents (IPIA). The aims and objectives of the IPIA must amongst others include induction of newly appointed education personnel, in-service training of staff, development of policy implementation monitoring tools and an annual plan on reporting and evaluation of education policies provincially, at district, circuit and school level. Feedback on the success and challenges faced by education managers during policy implementation should be done biannually and suggestions on amendments should be formulated in consultation with all education stakeholders annually. The use of advanced Information Communication Technology should be one of the priorities of the Department of Education.

d) Advocacy and training on the aims, objectives and focus areas of each education policy should be done annually. Feasibility study on the implications of each education policy

should be done to prepare for the effectiveness of policy implementation at all education levels. Common programmes or activities that can enhance the understanding, analysis and interpretation of the education policiesmust be developed as provincial or District Action Plan.

e) Induction programmes, mentoring and coaching should be part of the activities during the first twelve months of probation when education managers are appointed into a new position. The Department of Labour in joint effort with the Public Service Administration should implement the Skills Development Act of 1998 to access funds from the Department of Labour for employees' empowerment.

f) Integrated Quality Management Systems for educators and Performance Management and Development Systems should be integrated to develop one performance and quality assurance system whose criteria are based on education policies relevant to each section or level within the Department of Education. Self and peer evaluation should be phased out and a unit or section in the department should be established and entrusted with the objective evaluation of education personnel on the execution of their duties. An Independent Body on Quality Assurance (IBQA) responsible for quality assurance should be appointed to serve on three-year contract. The aims and objectives of the IBQA should be spelt out in simple language. All education personnel in managerial positions should be appointed on contract which may be renewed on excellent achievement of performance criteria. Education managers who are excellent in policy implementation and service delivery should receive annual cash bonuses. Further education bursaries on leadership and management courses should be awarded on merit.

g) Deployment of officials by political parties should not be done for education management posts. The minimum requirements for promotional posts at province, district or school level should change from three-year diploma to at least a senior degree or postgraduate diploma or degree. The improvement of qualifications should effect changes on salary scales or notches, not simply a once-off cash bonus upon the submission of improved qualifications. The appointment of short-listing and interview panels should be as neutral and objectives as possible. Employee unions should serve as observers, not active participants. The Department of Education should engage the services of employment

agencies to handle all the advertising, short-listing and recommendations for appointment process to avoid all forms of subjectivity and nepotism. There should be legal officers employed to observe all rationalisation processes to minimise irregularities and grievances pertaining to unprocedural appointments. All management appointments should be based on a renewable five-year contract, subject to satisfactory work performance before they are considered for renewal.

h) Induction and continous training on financial management should be compulsory programmes for the Department of Education to empower civil servants to use resources optimally. All education managers convicted on charges of mismanagement of funds should be held accountable and refund money or goods that belong to the Department of Education. The state should provide funds to address problems such as overcrowded classrooms, lack of accommodation, lack of equipment and textbooks, and shortage of staff, and improve the remuneration package to attract competitive personnel. The Department of Education should form partnerships with NGOs and prioritise the needs.

i) Delegation of authority to circuit managers to enforce rules should be done to decentralise the powers of the provincial MEC and HoD's office. Delegation of powers from the Head of Department of Education to the District Managers, Circuit Managers and School Managers should be done in writing. District Disciplinary Committees should focus on constructive reprimand and corrective measures that may leave no significant damage to all other education stakeholders. Statistics of cases of misconduct and charges should be issued annually through departmental circulars to serve as warning to other education personnel. The senior officials of the Department of Education should refrain from the principle of "*declaration without implementation*", which lowers the value of education policies.

j) School Managers execute the professional management of the school, ensure that all duties are carried out correctly in the daily functioning of the school and inform the SGB of issues, problems or activities at the school under the authority of the Head of Department. School Managers should be encouraged to have copies of all national, provincial and school-based policies and manage the school according to the requirements of each policy. Decision-making should not be based on common sense.

Minimum qualifications for parents' membership on the SGB should be part of SASA. A minimum of a grade 12 certificate must be a prerequisite for parent members to be elected as SGB members. A diploma or degree relevant to school governance should serve as a strong recommendation or added advantage. Finance officers should have at least a diploma in financial management in order to execute finance management tasks accurately and create financially viable schools. Experts in finance management should be co-optedto assist the SGB in managing school finances. The terms of office for the School Governing Body should be at least five years for continuity and gaining experience.

### 4.4.2   Recommendations for future research

The research study focused on the understanding, analysis and interpretation of the selected education policies, and findings were limited to knowledge of policies, policy implementation and challenges facing policy implementers in relation to the effective leadership and management of quality education. I therefore recommend further studies on the following issues that emerged during the study but did not get adequate attention:

a) A qualitative study on the implementation of specific education policies such as NEPA, SASA, EEA, ELRA, PFMA or Chapter Two of the Constitution of RSA, Act 108 of 1996 in relation to the provision of quality education.

b) A quantitative research study on the role of education stakeholders in policymaking and implementation in public schools.

c) The participation of education stakeholders in policymaking process.

d) Factors contributing to the provision of quality education in public schools.

e) The induction of newly appointed education district personnel: A case study of a selected district.

### 4.5   LIMITATIONS OF THE PRESENT RESEARCH STUDY

A number of limitations were encountered during the course of the study. Firstly, I used purposive sampling where voluntary participation was encouraged. The sample was drawn from

a specific community. There is no guarantee that data collected may be the same in another context. Secondly, it was not easy to record the responses of the participants in the interviews as Limpopo Department of Education was under administration of the National government, section 100(b). Thirdly, the research was conducted in Limpopo Province and cannot be generalised since the research findings may not be true for all eight the provinces with different education administrative systems, political influences and environmental factors or contexts.

## 4.6   FINAL CONCLUSION

The findings in this study revealed that knowledge of education policies is a pre-requisite for the implementation of such policies for the attainment of their aims and objectives and fulfilling the purpose for which they were developed by the government. Therefore, the participation of stakeholders in policy-making and implementation should start at the initial stage of identifying policy agenda. This should be communicated within all sections in the Department of Education and express the need for improvement in co-ordination of policy implementation. There should be a common perception among education managers of quality in education so that education policies will be implemented consistently and for the attainment of common goals. Appointment and induction of Department of Education personnel on policy implementation should receive high priority. The Department of Education has a major role to play in funding activities that may lead to effective policy implementation, and effective monitoring and support systems. Management of change in the transformation of education systems into one uniform education system that offers equal access and equity to all South African citizens should be encouraged at all costs. Recruitment of personnel must consider qualifications and experience on the specific promotional post rather than political deployment of incompetent incumbents. Governance and management of public policy enforcement agencies must be put in place.

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# ANNEXURES

## A: Letter requesting permission to conduct research in Limpopo Province Department of Education

| | |
|---|---|
| Ref: 3061-857-6 | P.O. Box 1539 |
| Enq: Ndou N | Lwamondo |
| Cell: 0787085295 | 0985 |
| E-mail: ndouraphulu@gmail.com | 04 February 2014 |

The Head of Department

Limpopo Province Department of Education

Private Bag x 9489

POLOKWANE

0700

**APPLICATION FOR CONDUCTING RESEARCH IN LIMPOPO PROVINCE DEPARTMENT OF EDUCATION: NDOU NNDWAMATO PERSAL: 803970**

1. The above matter refers

2. I hereby request to conduct research in Limpopo Province Department of Education in part fulfilment for the Doctor of Education degree (DEd) in Education Management with the University of South Africa.

3. The details of my research study are as follows:

3.1. Research title: The implementation of education policies for effective leadership and management of quality education in public schools in the Limpopo province, South Africa.

3.2. Supervisor: Prof. Mbunyuza de-Heer Menlah

3.3. Telephone number: 0123524159

3.4. E-mail: mbunynm@unisa.ac.za

3.5. Estimated period for data collection: 10 March 2014 to 30 May 2014

4. The research study will draw participants from all the five districts, namely Vhembe, Mopani, Capricorn, Sekhukhune and Waterberg. Interviews will be conducted with the District Senior Managers, Human Resource Managers, Governance Managers, Labour Relations Managers, Finance Managers, Circuit Managers, School Managers and Educators within your district.

5. You will receive a copy of thesis of which the research findings and recommendations may be used for the improvement of the implementation of education policies and enhancement of quality education provision at all public schools.

6. Kindly find attached copies of registration and confirmation letters from the University of South Africa.

_____

Ndou Nndwamato

**B: Permission to conduct research from Limpopo Province Department of Education**

LIMPOPO
PROVINCIAL GOVERNMENT
REPUBLIC OF SOUTH AFRICA

DEPARTMENT OF
**EDUCATION**

Enquiries: Dr. Makola MC, Tel No: 015 290 9448. E-mail: MakolaMC@edu.limpopo.gov.za

PO BOX 1539

LWAMONDO

0985

NDOU N

**RE: Request for permission to Conduct Research**

1. The above bears reference.
2. The Department wishes to inform you that your request to conduct a research has been approved- TITLE: **THE IMPLEMENTATION OF EDUCATION POLICIES FOR EFFECTIVE LEADERSHIP AND MANAGEMENT OF QUALITY EDUCATION AT PUBLIC SCHOOLS IN LIMPOPO PROVINCE,SOUTH AFRICA**
3. The following conditions should be considered

   3.1 The research should not have any financial implications for Limpopo Department of Education.

   3.2 Arrangements should be made with both the Circuit Offices and the schools concerned.

   3.3 The conduct of research should not anyhow disrupt the academic programs at the schools.

   3.4 The research should not be conducted during the time of Examinations especially the forth term.

   3.5 During the study, the research ethics should be practiced, in particular the principle of voluntary participation (the people involved should be respected).

   3.6 Upon completion of research study, the researcher shall share the final product of the research with the Department.

4. Furthermore, you are expected to produce this letter at Schools/ Offices where you intend conducting your research as an evidence that you are permitted to conduct the research.

Page 1 of 2

Cnr. 113 Biccard & 24 Excelsior Street, POLOKWANE, 0700, Private Bag X9489, POLOKWANE, 0700
Tel: 015 290 7600, Fax: 015 297 6920/4220/4494
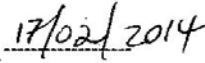The heartland of southern Africa - development is about people!

5. The department appreciates the contribution that you wish to make and wishes you success in your investigation.

Best wishes.

_Dederen_

Dederen K.O

**Acting Head of Department**

17/02/2014

Date

**C: Permission to conduct research from Vhembe District**

LIMPOPO
PROVINCIAL GOVERNMENT
REPUBLIC OF SOUTH AFRICA

DEPARTMENT OF
**EDUCATION**
**VHEMBE DISTRICT**

Ref: 12/2/4/5

Enq: Manenzhe T.A

TEL: 082 868 3499

NDOU NNDWAMATO

P O BOX 1539

LWAMONDO

0985

**REQUEST FOR PERMISSION TO CONDUCT RESEARCH IN VHEMBE DISTRICT**

1. Permission is hereby granted to you to conduct your research at the identified schools in Vhembe District.

2. We advise you to conduct research with the consent of both circuit managers and principals of the identified schools.

3. The research process should at no stage disrupt the normal learning and teaching time.

4. Wishing you all the best.

.......................................                05/03/2016
**DISTRICT SENIOR MANAGER**                         **DATE**

**D: Permission to conduct research from Sekhukhune District**

# LIMPOPO
### PROVINCIAL GOVERNMENT
#### REPUBLIC OF SOUTH AFRICA

## DEPARTMENT OF
# EDUCATION

### SEKHUKHUNE DISTRICT

Enq  : Mothiba B.O
Tel   : 015 633 7154
Date : 27/02/2014

To   : Mr. Nduo Nndwamato
      Student: Doctor of Education Degree (DEd) in Education Management
      University of South Africa

From: District Senior Manager
       Sekhukhune District

**SUBJECT: GRANTED PERMISSION TO CONDUCT A RESEARCH.**

1. The above matter refers.

2. Kindly be informed that your research application to conduct research in schools, circuits and district focusing on the title **"The implementation of education policies for effective leardership and management of quality education at public schools in the Limpopo province, South Africa".**, is approved.

3. Please note you should conduct your research in line with research ethics as prescribed by your institution and international norms and standards for research.

4. The district wishes you well in your research and awaits your findings with great interest.

_Nkadimeng_             28 . 02 . 2014

**DISTRICT SENIOR MANAGER**        DATE

**MR. NKADIMENG T.G**

**E: Ethical Clearance Certificate from UNISA CEDU-REC**

# UNISA
college of education
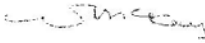
## Research Ethics Clearance Certificate

This is to certify that the application for ethical clearance submitted by

**N Ndou [30618576]**

for a DEd study entitled

**The implementation of education policies for effective leadership management of quality education at public schools in the Limpopo province, South Africa**

has met the ethical requirements as specified by the University of South Africa College of Education Research Ethics Committee. This certificate is valid for two years from the date of issue.

Prof VI McKay
Acting Executive Dean, CEDU

UNISA
COLLEGE OF EDUCATION
2014 -11- 21
Reference number: 2014 NOVEMBER /30618576/MC

Dr M Claassens
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17 NOVEMBER 2014

**F: Confidentiality letter for the focus-group interviews**

Ref: 3061-857-6                     P.O. Box 1539

Enq: Ndou Nndwamato Lwamondo

Cell: 0787085295          0985

Email: ndouraphulu@gmail.com09 June 2014

**Dear Prospective Focus-group Participant**

Re: CONSENT TO PARTICIPATE IN THE FOCUS-GROUP INTERVIEWS

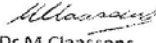I am a Doctor of Education student at the University of South Africa. I am currently engaged in a research project entitled: The implementation of education policies for effective leadership and management of quality education at public schools in the Limpopo Province, South Africa. The research project is being conducted under the supervision of Professor NMM Mbunyuza–de Heer Menlah from the College of Education, Department of Educational Leadership and Management. She can be contacted at 012 352 4159 or 072 649 5731 or email: mbunynmm@unisa.ac.za

The primary goal of the study is to identify the education policies that are in place for the effective leadership and management of the South African education system, and to find out how education managers in Limpopo Province understand, interpret and implement education policies towards effective leadership and management of quality education in public schools.

The researcher will invite participants to take part in the scheduled focus-group interviews to collect data on the implementation of education policies. Each interview will last for approximately 30 to 45 minutes and will be tape-recorded, transcribed verbatim by the researcher and a qualified independent coder, who will verify the findings. You are therefore requested to be one of the ten participants who will participate in the focus-group interviews at a specified time that will be communicated to you well in advance. A focus-group interview is conducted when 7 – 10 participants assemble together to answer guided research questions led by the researcher. The participants share their views, experiences or perceptions on the structured interview questions posed to them.

The information gathered from the study will be used for the purpose of the research study and to contribute to the understanding, interpretation and implementation of education policies in public schools in the Limpopo Province. The information may also be used at presentations at conferences and for the writing of an article in an educational journal.

The researcher will ensure anonymity by omitting the use of your name on any of the data collection material. A code will be allocated to each participant and a master list will be kept in separate place under lock and key. Furthermore, confidentiality will be assured in that only the researcher and the independent coder will peruse the transcribed material. While every effort will be made by the researcher to ensure that you will not be connected to the information that you share during the focus group, I cannot guarantee that other participants in the focus group will treat information confidentially. I shall, however, encourage all participants to do so. For this reason I advise you not to disclose personally sensitive information in the focus group.

Participation is strictly free and voluntary and you are under no obligation to take part in the study. You may withdraw your consent to take part or to stop your participation at any time and without penalty or negative consequences or loss of benefits to which you are otherwise entitled.

If you would like additional information concerning the study before, during or after it is complete, feel free to contact the researcher by phone or email.If you would like to be informed of the final research findings, please contact Ndou Nndwamato on 078 708 5295 or email address ndouraphulu@gmail.com. The findings will be accessible for a period from January 2016 after the final approval by the university.

Should you have concerns about the way in which the research has been conducted, you may contact Prof. Mbunyuza De-Heer Manlah at 012 352 4159 or 072 649 5731 or emailmbunyumm@unisa.ac.za. Alternatively, contact the researcher ethics chairperson of the CEDU REC Dr. Madaleen Claassens at 012 346 0701 or 082 940 2693 or email address mcdtc@netactive.co.za

The University of South Africa developed the research ethical guidelines and is responsible for ethical approval before the researcher can embark on data collection from the participants.

Thank you for taking time to read this information sheet and for participating in this study.

_____

Ndou Nndwamato

SPTD, BA, FED, BED (Hon). MED: Student


CONSENT TO PARTICIPATE IN THE FOCUS-GROUP INTERVIEWS

I (Surname and initials )_____with my signature, voluntarily consent to participate in the above-mentioned research project and give permission for this research project to be tape-recorded. I confirm that I have read and understand the content of the consent form and received a copy of the consent form to keep. I will respect all the participants in the focus-group interviews and agree to keep confidentiality of their views or contributions and under no circumstances will I disclose or share the information with any person or institutions and this agreement will be binding to all members of the focus group.


_____ _____

Signature of the participant          Date

**G:Informed consent form**

Ref: 3061-857-6                                  P.O. Box 1539

Enq: Ndou Nndwamato                          Lwamondo

Cell: 0787085295                                 0985

Email: ndouraphulu@gmail.com              09 June 2014

**Dear Prospective Participant: School Manager**

Re: CONSENT TO PARTICIPATE IN RESEARCH

I am a Doctor of Education student at the University of South Africa. I am currently engaged in a research project entitled: The implementation of education policies for effective leadership and management of quality education at public schools in the Limpopo Province, South Africa. The research project is being conducted under the supervision of Professor NMM Mbunyuza –de Heer Menlah fromCollege of Education, Department of Educational Leadership and Management. She can be contacted at 012 352 4159 or 072 649 5731 or email: mbunynmm@unisa.ac.za

The primary goal of the study is to identify the education policies which are in place for the effective leadership and management of South African education system, to find out how education managers in Limpopo Province understand, interpret and implement education policies towards effective leadership and management of quality education in public schools.

The researcher will invite participants to take part in the scheduled interviews to collect data on the implementation of education policies. Each interview will last for approximately 30 to 45 minutes and will be tape-recorded, transcribed verbatim by the researcher and a qualified independent coder who will verify the findings. You are therefore requested to be one of the 49 participants who will participate in interviews individually or as a group at a specified time of their choice.

The information gathered from the study will be used for the purpose of the research study and to contribute to the understanding, interpretation and implementation of education policies in public schools in Limpopo Province. The information may also be used at presentations at conferences and for the writing of an article in an educational journal.

There is no risk or harm involved in participation in the research study. The immediate benefit of the study to you is that you will be able to communicate your experiences on the implementation of education policies for the provision of quality education in public schools.

The researcher will ensure anonymity by omitting the use of your name on any of the data collection material. A code will be allocated to each participant and a master list will be kept in separate place under lock and key. Furthermore, confidentiality will be assured in that only the researcher and the independent coder will peruse the transcribed material.

Participation is strictly free and voluntary and you are under no obligation to take part in the study. You may withdraw your consent to take part or to stop your participation at any time and without penalty or negative consequences or loss of benefits to which you are otherwise entitled.

If you would like additional information concerning the study before, during or after it is complete, feel free to contact the researcher by phone or email.If you would like to be informed of the final research findings, please contact Ndou Nndwamato on 078 708 5295 or email address ndouraphulu@gmail.com. The findings will be accessible for a period from January 2016 after the final approval by the university.

Should you have concerns about the way in which the research has been conducted, you may contact Prof. Mbunyuza De-Heer Manlah at 012 352 4159 or 072 649 5731 or emailmbunyumm@unisa.ac.za. Alternatively, contact the researcher ethics chairperson of the CEDU REC Dr. Madaleen Claassens at 012 346 0701 or 082 940 2693 or email address mcdtc@netactive.co.za

The University of South Africa developed the research ethical guidelines and is responsible for ethical approval before the researcher can embark on data collection from the participants.

Thank you for taking time to read this information sheet and for participating in this study.

_____

Ndou Nndwamato

SPTD, BA, FED, BED (Hon). MED: Student

CONSENT TO PARTICIPATE: POLITICIAN

I (Surname and initials) _____with my signature, voluntarily consent to participate in the above-mentioned research project and give permission for this research project to be tape-recorded. I confirm that I have read and understand the content of the consent form and received a copy of the consent form to keep.

_____

Signature of the participant Date

**H: Observation schedule for schools**

**Research title**: The implementation of education policies for effective leadership and management of quality education at public schools in the Limpopo Province, South Africa.

1. Date of the observation: _____

2. Time and duration of the observation: _____

3. Name of institutionand code:_____

4. Focus areas of observation.

    a. Finance policy

    b. Admission policy

    c. SGB constitution

    d. Code of conduct for learners

    e. Code of conduct for educators

    f. Health and safety policy

    g. Academic Performance Implement Plan

    h. School Equity Plan

    i. District and School Equity Plan

    j. School Leave register

5. Criteria for document analysis

    a. Preamble of the policy

    b. Legislative sources of such policy

    c. Focus areas of such policy or plan

    d. The impact of such policy on the provision of quality education

    e. Challenges facing implementers of such policy

    f. Short-comings of the existing policies

6. Findings:_____

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7. Conclusions:_____

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8. Recommendations:_____

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9. Signature of the researcher:_____

**I: Interview schedules for District Finance Managers**

1. Briefly discuss your roles and responsibilities as District Finance Manager.
2. What are the aims and objectives of the following education policies and prescripts:

    2.1. National Education Policy Act, No.27 of 1996.

    2.2. Public Finance Management Act, No. 1 of 1999.

    2.3. South African Schools Act, No. 84 of 1996.

    2.4. Prescripts for the management of school fund in public schools of the Limpopo Province.

3. What are the guidelines , regulations or proceduresfor the management of funds in

    3.1. Section 20 schools

    3.2. Section 21 schools

    3.3. "No fee" schools

    3.4. "Fee" paying schools

4. Could you explain the relationship between funding of schools and the provisioning of quality education?
5. What are the challenges facing school managers and educators in the implementation of finance policies in public schools?
6. Do you have incidents of non-compliance in the implementation of finance policies reported to the district in the past three years? Briefly give examples where appropriate.
7. Could you suggest ways and means in which norms and standards for school funding allocations may enhance the quality of education in public schools?
8. 'The provision of free quality education for all" is embedded on the Constitution of the Republic of South Africa (Act 108 of 1996)" How best can you rank the implementation of this policy in public schools in the Limpopo Province? Are there some challenges and how can they be addressed?

**Thank you for your participation**

# J: Interview schedules for District Senior Managers

1. What are the major roles and responsibilities of the district in the provisioning of quality education in public schools?

2. could you briefly discuss the features or characteristics of quality education?

3. Briefly discuss the aims and objectives of the following education policies:

   3.1. Constitution of the Republic of South Africa, Act No. 108 of 1996.

   3.2. National Education Policy Act, No. 27 of 1996.

   3.3. South African Council of Educators Act, No. 31 of 2000.

   3.4. Employment of Educators Act, No. 76 of 1998.

   3.5. Employment Equity Act, No. 55 of 1998.

   3.6. Public Finance Management Act, No. 1 of 1999.

   3.7. South African Schools Act, No. 84 of 1996.

   3.8. Labour Relations Act, No. 66 of 1995.

4. Do you have programmes or systems for education quality assurance in your district? How are you implementing the programmes? What are the challenges you are facing during and after the implementation of such activities.

5. Which recruitment criteria are you using to attract competent district personnel, school managers and educators in your district? Which major education policies do you normally use to assist in appointing suitable candidates for specific posts? Do you have induction programmes for newly appointed personnel? Briefly explain.

6. "Human, physical and financial resources are to be provided by the state on an equitable basis" How is the district assisting in the implementation of this section of the policy? What kinds of problems are being encountered during the implementation?

7. Different teaching and learning approaches have been implemented from 1994 to date. They range from Outcomes-Based Education, National Curriculum Statement, Revised National Curriculum Statement and Curriculum and Assessment Policy Statement. How did these different approaches contribute to the current quality of education in public schools?

8. How are you facilitating and monitoring the implementation of the following education policies at schools under your district:

   8.1. Inclusive education policy8.5. Language policy

   8.2. National Assessment Policy 8.6. Safety and security policy

   8.3. Admission policy8.7. Leave policy

   8.4. HIV & AIDS policy8.8. Finance policy

9. What do you see as challenges facing circuit managers and school managers in the implementation of education policies?

10. Could you suggest the strategies that can be used to enhance the implementation of education for effective leadership and management of quality education in public schools?

**Thank you for your participation**

## K: Interview schedules for Governace Managers

1. What are you major roles and responsibilities as governance managers?
2. What are the aims and objectives of the following education policies:
   2.1. South African Schools Act, No. 84 of 1996
   2.2. Public Finance Management Act, No. 1 of 1999
   2.3. National Education Policy Act, No. 27 of 1996
3. In terms of SASA, 84 of 1996 which responsibilities has been assigned to the School Governing Bodies in line with the following:
   3.1. Funding
   3.2. Human Resource Management
   3.3. Maintenance of Physical Infrastructure
4. In your opinion, is parental participation in the education of their children at the expected standard in public schools? Briefly motivate your answer.
5. Did you participate in the development of the mandatory policies by the SGBs in public schools? How is your participation?
6. What are the challenges facing school managers in the implementation of the following policies in public schools:
   6.1. Admission policy
   6.2. Religious policy
   6.3. Health policy
   6.4. Safety and security policy
   6.5. HIV and AIDS policy
   6.6. Infrastructure Maintenance Policy
   6.7. Language policy
   6.8. Finance policy
7. could you differentiate between governance and management of schools? Which structures are responsible for governance and management? Are there some challenges in the effective functioning of structures at school?
8. How often do you visit schools for monitoring and support?
9. Which recommendations would you give for the effective functioning of the School Governing Bodies?

**Thank you for your participation**

**L: Interview schedules for Curriculum Managers**

1.  What are the aims and objectives of the following Acts:
    1.1. Employment of Educators Act, No. 76 of 1998
    1.2. Employment Equity Act, No. 55 of 1998
    1.3. Basic Conditions of Employment Act, No. 75 of 1997
    1.4. Labour Relations Act, No. 66 of 1995
2.  Briefly discuss the recruitment criteria and procedures for circuit and school managers.
3.  Do you have induction or training programmes for newly appointed circuit managers? How are you implementing the capacity-building programmes in your district? In terms of circuit and school managers' performance, are you satisfied with the knowledge of the legislations they have? Briefly explain.
4.  Briefly discuss the post-provisioning model for the educators in Limpopo Province. What is the educator-learner ratio in primary and secondary schools?
5.  Is the provisioning of educators and support staff on equitable basis across the entire district? Substantiate your answer.
6.  Do you have a District Equity Plan? Ccould you briefly outline the position of the district in the implementation of the Employment Equity Act, No. 55 of 1998.
    6.1. Appointment oflevel one educators
    6.2. Appointment ofeducators as Heads of Departments (HODs)
    6.3. Appointment of educators as Deputy School Managers and School Managers
    6.4. Appointment of Circuit Managers
7.  Is there any relationship between the recruitment of educators and the provisioning of quality education in public schools? Briefly explain.
8.  Which communication system amongst circuit managers, school managers and district officials do you think can enhance the implementation of education policies in public schools in the Limpopo Province?
9.  Which subjects are regarded as "scarce skills subjects" in your district? How are you currently addressing the shortage of educators? What are you future plans for the supply of educators to all schools on equitable basis?

**Thank you for your participation**

# M: Interview schedules for School Managers

1. What are the management tasks of the school manager at public school?
2. Do you have copies of the following policies in your school?

3.1. Extra-mural policy

3.2. Assessment Policy

3.3. Admission policy

3.4. Language policy

3.5. Safety and security policy

3.6. Finance policy

3.7. HIV & AIDS policy

3.7. Religious policy

3.8. Subject policy

3.9. School Maintenance policy

3.10. Recruitment policy

4. Which groups of people participated in the development of the above-mentioned school-basedpolicies?

5. Do you have copies of the following education policies developed at national level?

5.1. Constitution of the Republic of South Africa, Act No. 108 of 1996.

5.2. National Education Policy Act, No. 27 of 1996.

5.3. South African Council of Educators Act, No. 31 of 2000.

5.4. Employment of Educators Act, No. 76 of 1998.

5.5. Employment Equity Act, No. 55 of 1998.

5.6. Public Finance Management Act No. 1 of 1999.

6. Were you capacitated in the understanding and interpretation of education policies? What programmes did you go through? Did you benefit from such programmes?

7. How best can you define what quality education is?

8. What factors can contribute positively to the provision of quality education in public schools?

9. Which education stakeholders do you think can impact on the provisioning of quality education?

10. Did you ever experience a situation where educators were charged for misconduct? Which education policies were violated by the educator in question? What do you think can be the cause of such misconduct? What are your suggestions on the implementation of education policies at school level? Brief discuss.

**Thank you for your participation**

## N: Interview schedules for Circuit Managers

1. What do you understand by quality education?

2. What are the roles and responsibilities of circuit managers in the provisioning of quality education in public schools?

3. Do you have copies of the following education policies:

    3.1. Constitution of the Republic of South Africa (Act 108 of 1996)

    3.2. National Education Policy Act (Act No. 27 of 1996)

    3.3. South African Council of Educators Act (Act No. 31 of 2000)

    3.4. Employment of Educators Act (Act No. 76 of 1998)

    3.5. Employment Equity Act ( Act No. 55 of 1998)

    3.6. Public Finance Management Act (Act No. 1 of 1999)

    3.7. South African Schools Act (Act No. 84 of 1996)

    3.8. Labour Relations Act, (Act No. 66 of 1995)

    3.9. Curriculum and Assessment Policy Statement (CAPS)

4. How do you monitor the implementation of education policies in public schools?

5. Briefly discuss the features of Revised National Curriculum Statement (RNCS) and Curriculum and Assessment Policy Statement (CAPS). In your opinion, is CAPS enhancing the provision of quality education in public schools?

6. How can you rate the quality of education in public schools? What can be done to improve or maintain the quality of education at schools in your circuit?

7. Do you conduct a reading and numerating audit in public primary schools? How often do you do such exercises? Is there any learner performance improvement in Languages and Mathematics? What can you suggest as ways of improving learner performance in those subjects?

8. Briefly discuss the guidelines, rules and procedures for the implementation of assessment policy in public schools in the Limpopo Province. What are the common errors in the implementation of progression and promotion requirements?

9. How do you quality assure the formal tasks given to learners on quarterly basis in public schools? Do you have monitoring instruments for pre and post-moderation of formal tasks?

10. How do you monitor quality and compliance of the school managers' submission of the following mandatory reports to circuit office:

    10.1. Educators 'quarterly school attendance

    10.2. Learners' quarterly school attendance

    10.3. Learners academic performance

    10.4. Annual National Assessment Comparative Analysis

    10.5. Academic Performance Improvement Plan

    10.6. School Improvement Plan

11. Which challenges are school managers facing in the implementation of education policies in public schools?

12. What are your suggestions for effective leadership and management of quality education in public schools?

**Thank you for your participation**

**O: Interview schedules for Educators**

1.  What are the roles and responsibilities of educators in public schools?
2.  Briefly discuss the aims and objectives of the following education policies:

    2.1. Employment of Educators Act, No. 76 of 1998.

    2.2. National Education Policy Act, No. 27 of 1996.

    2.3. Labour Relations Act, No.66 of 1995.

    2.4. Employment Equity Act, No.55 of 1998.

    2.5. Constitution of the Republic of South Africa (Act 108 of 1996)

3.  Did you receive training on the implementation of Curriculum and Assessment Policy? For how many days were the workshops? Do you think the knowledge acquired was adequate to implement CAPS?
4.  Are you able to access the following policies in your school:

    4.1. National Assessment Policy

    4.2. School Assessment Policy

    4.3. HIV and AIDS policy

    4.4. Safety and security policy

    4.5. Language policy

    4.6. Religious policy

5.  Were you part of the development process of the above-mentioned policies? What was your participation? Do you think those policies are still relevant to the currenteducation system. Motivate your answer.
6.  "In terms of the Employment of Educators Act (Act 76 of 1998) the employer must create working conditions which are conducive for teaching and learning" Would you rate your working conditions as "good" or "with numerous challenges? Briefly discuss.
7.  "Since 1994 general elections, the Department of Education has undergone several changes in the provision of quality education" Would you identify such changes and explain how you are being part of the implementation of such changes in your school.
8.  What kind of support are you receiving from the district officials in the execution of your work as an educator?

**Thank you for your participation**

## P: Interview schedules for Educators' Unions

1. What are the roles and responsibilities of educators' unions in the Department of Education?

2. What are the aims and objectives of the following education policies:

   2.1. South African Schools Act, No. 84 of 1996

   2.2. Employment of Educators Act, No. 76 of 1998

   2.3. Labour Relations Act, No. 66 of 1995

   2.4. National Education Policy Act, No. 27 of 1996

   2.5. Basic Conditions of Employment Act, No 75 of 1997

   2.6. Employment Equity Act, No. 55 of 1998

3. Which challenges are your educators facing on the implementation of the above-mentioned education policies? Briefly discuss.

4. In your own observation as educator representatives, is the employer providing proper basic conditions of employment to your educators in public schools? Substantiate your answer.

5. Did you ever participate on the development of the education policies at provincial level? How did you participate? What are your recommendations for future participation?

6. Did you receive cases of misconduct of educators in the Limpopo Province in the past three years? What were the causes of such unprofessional behaviour? Could you suggest possible preventative measures for the future?

7. Are your educators well capacitated in terms of the knowledge of policies? How did you empower them? What are the impacts of your capacity-building programmes in the implementation of education policies at school level?

8. Are the education policies able to bring along the delivery of quality education in public schools? What can you recommend to the employer to enhance the provision of quality education in public schools?

9. "The rights of educators to strike and the rights of learners to receive education seem to impose confusion on the provisioning of quality education". What is your view in this regard? What are the common causes of strike actions in the education sector? How best can the strike actions be avoided?

10. Could you briefly explain the relationship amongst school managers and educators in terms of the implementation of education policies? Do you think they have same understanding of the education legislations? Suggest ways in which the relationship may be improved for effective leadership and management of quality education.

**Thank you for your participation**

**Q**: Editing declaration

## Leonie Viljoen (Dr)
## Language Practitioner

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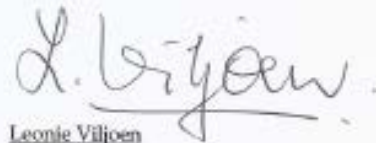7129

e-mail: viljol@telkomsa.net
Cell: 082 9244 733

## Declaration:
## Editing of Thesis

28 October 2015

To whom it may concern:

This is to certify that I have read and edited the doctoral thesis by **NNDWAMATO NDOU** entitled:

**THE IMPLEMENTATION OF EDUCATION POLICIES FOR EFFECTIVE LEADERSHIP AND MANAGEMENT OF QUALITY EDUCATION AT PUBLIC SCHOOLS IN THE LIMPOPO PROVINCE, SOUTH AFRICA**

Leonie Viljoen

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