

**PRINCIPALS' EXPERIENCES AND EXPECTATIONS OF THE ROLE OF  
THE INSTITUTIONAL DEVELOPMENT AND SUPPORT OFFICIAL (IDSO)  
IN SUPPORTING GAUTENG SCHOOLS**

by

**ELSIE LEONIE SATIE RAATH**

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**SUPERVISOR: DR. CLIVE SMITH**

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## ABSTRACT

There is 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. Many schools have difficulty in managing education change and thus depend on districts for support. In the education hierarchy, districts are closest to schools and can potentially influence school development. They have an important role to play in driving systemic reforms and in establishing the conditions for continuous and long-term improvement in schools. In South Africa the school district and, in particular, the role of the IDSO has not been researched much. However, there is a growing interest in understanding the important role the IDSO could play in supporting schools.

The aim of the research was to gain a clearer understanding from school principals in the Johannesburg West District in Gauteng as to how they think the IDSO can best support them. In order to realise the aim of the study, the following objectives were set, namely to:

- find out from participants what they understand the IDSO's role to be;
- find out from participants how they experience the current role of the IDSO; and
- explore what role participants would like the IDSO to play in supporting schools.

The research was located within the interpretative paradigm, using a case study method. Open-ended interviews allowed for a variety of rich narrative data which contributed to the findings in this research project.

Despite the importance attached to school districts, internationally as well as in South Africa, there is a tendency to ignore districts in school reform. Furthermore, there is little published research on school districts in South Africa. This research study is intended to make a contribution to the research on school districts in South Africa.

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*Blessing, and glory, and wisdom, and thanksgiving, and honour, and power, and might, be unto our God forever and ever. Amen. Revelations 7:12*

## DEDICATION

This work is dedicated in honour of my parents,

Len and Elsie Boshoff

I know for sure you would be incredibly overwhelmed with emotions of joy for this kind of achievement.



## DECLARATION

I declare that the research in my Minor-Dissertation submitted in fulfillment of the degree M.ED in Educational Management, entitled:

PRINCIPALS' EXPERIENCES AND EXPECTATIONS OF THE ROLE OF THE INSTITUTIONAL DEVELOPMENT AND SUPPORT OFFICIAL (IDSO) IN GAUTENG PROVINCE,

is my own work and thoughts, and further that this Minor-Dissertation is submitted to the University of Johannesburg and has not been submitted to any other University.

Elsie Leonie Raath



## ABBREVIATIONS AND ACRONYMS

ABET	Adult Basic Education and Training
ACE	Advanced Certificate in Education
B Ed	Bachelor of Education
BETD	Basic Education Teachers Diploma
CDS	Curriculum Development and Support
DDSP	District Development and Support Project
DET	Department of Education and Training
DoE	Department of Education
ECD	Early Childhood Development
ESS	Education Support Services
GDE	Gauteng Department of education
HM	Her Majesty
HMI	Her Majesty's Inspectors
HOD	Head of Department
HR	Human Resource
HRA	Human Resource Administration
HRM	Human Resource Management
IDS	Institutional Development and Support
IDSO	Institutional Development and Support Official
IEL	Institute for Educational Leadership

JW	Johannesburg West
LSEN	Learners with Special Educational Needs
LTSM	Learning and Teaching Support Material
NRwS	New Relationship with Schools
NTTEMD	National Task Team on Educational Management Development
NUT	National Union of Teachers
OFSTED	Office for Standards in Education
RCL	Representative Council of Learners
Rgi	Registered Inspector
RSA	Republic of South Africa
SA	South Africa
SASA	South African Schools Act
SEF	Self-Evaluation Form
SGB	School Governing Body
SIP	School Improvement Plan
SMT	School Management Team
TED	Transvaal Education Department
UK	United Kingdom
USA	United States of America



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## CHAPTER ONE

### BACKGROUND TO THE STUDY

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#### 1.1 INTRODUCTION AND MOTIVATION

Since the start of the 21<sup>st</sup> century great interest has been shown in educational leadership. Bush (2007:293) suggests that 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, it is recognised that schools require effective leaders and managers if they are to provide the best possible education for their learners.

The South African education system has undergone vast changes in recent years. During the 'apartheid' era (a period from the 1950s up until 1990 when laws in South Africa favoured white supremacy and largely marginalised the non-white communities) the educational system employed highly centralised decision-making processes and well-developed decentralised structures through which to implement policies. Critics, however, have argued that the apartheid-era system of 'top-down' administration proceeded without the consultation or participation of those who implemented the decisions (Department of Education, 1996:19; Gallie, Sayed & Williams, 1997: 92).

In the early days of its existence the Gauteng Department of Education (GDE) was proud of the power it bestowed upon the districts. District officials were seen as the "kingpin between the provincial department and the schools and were there to ensure regular and reliable feedback to the department on policy implementation and school change" (De Clerq, 2001:44). In South Africa the term 'district' refers to an administrative sub-unit of the provincial education Head Office (McKinney, 2009:3). In other words, the educational district is a form of administrative decentralisation where provincial government has delegated administrative and decision-making authority to lower levels to plan, manage and administer on its behalf.

In the education hierarchy, districts are in closer proximity to schools and can potentially influence school development (Muller & Vinjevd, 2003:15). They have an important role to play in driving systemic reforms. Many schools experience difficulty in managing change in education and thus rely on districts for support.

Fullan (1992:209) is of the opinion that sustained school improvement requires substantial restructuring of the school, the district and their inter-relationship. Districts perform an important role in establishing the conditions for continuous and long-term improvement in schools. Fullan explains this more concisely by stating, “The school will never become the centre of change if left to its own devices” (1992:203).

As stated by Chinsamy (2002:3), schools that have been involved in school improvement projects indicate that success is linked to the balancing of pressure on and support for the school. The head offices of provincial education departments are, however, not in a position to adequately pressurise or offer support to schools as they are largely staffed for the purposes of policy formulation. It then becomes the responsibility of the intermediate structure between the head office and the schools - the circuit or district office - to fulfil this role.

The role of districts in sustainable school improvement efforts has frequently been asserted in the international literature (Corcoran, Fuhrman & Blecher 2001; Massell, 2000). In the context of the United States of America (USA), Massell (2000:6) argues that districts are “the major source of capacity-building for schools” in the school reform process. Despite this, Massell points out the tendency to ignore districts in state and federal reform. This prompted Spillane and Thomas (in Roberts, 2001:1) to refer to school districts as the “neglected layer” in the educational system.

Chinsamy (2002:8) deems the district office - the way it is comprised, its functions and roles, its management and its vision and the way it operates - pivotal to successful school improvement. One of the most important factors influencing school effectiveness is the nature and quality of the leadership and management provided by the Institutional Development and Support Official (IDSO). The IDSOs are responsible for the overall functionality of schools and perceive themselves as managers of principals and schools (Narsee, 2006:120). The IDSO’s role is vital in maintaining high levels of school leadership and management. They have to monitor and support school functionality, the learning environment and performance, focusing on school organisation structures (SMT, RCL and SGB parents) and administrative systems (planning, school finances and labour relations). In this way,

they are to provide a supportive environment in which quality educational programmes are offered.

## **1.2 PROBLEM STATEMENT**

### **1.2.1 Background to the problem**

Subsequent to 1998, provincial education departments in South Africa embarked on comprehensive organisational changes in response to both internal and external pressure (Fleisch, 2002:14). These changes concentrated on developing customer level delivery structures, most commonly referred to as district offices. The new district offices in Gauteng were assigned to facilitate and support the implementation of national policies such as school governance reform and curriculum change, to respond to the specific needs of schools and to ensure efficient provision of routine administrative services (Fleisch, 2002:14).

Roberts (2001:3) states that the core purpose of educational districts is to support the delivery of the curriculum and to ensure that all learners are provided with high quality learning opportunities, the quality of which is evidenced through learner achievement. According to Roberts (2001:3), the potential of a district to be the pivot around which educational change and improvement revolves, lies in the district's ability to fulfil its core function. Consequently the IDSOs employed by the Department of Education (DoE) are strategically placed in district offices. They fulfil a fundamental role supporting schools in areas such as school management and school governance as well as ensuring equality and equity through admissions, nutrition programmes and curriculum delivery.

Districts are expected to support schools in improving learning and teaching (Narsee & Chinsammy, 2003:117). However, the absence of a job description for the IDSO and the lack of clarity on different roles and responsibilities of all district officials have hampered their ability to function effectively (McKinney, 2009:14). This is a major obstacle in promoting district development and it impedes districts in fulfilling their role in school support.

In the light of the above discussion, the problem to be researched in this particular study is the experiences and expectations that school principals in the Johannesburg West District (JW) have of the role of the IDSO in supporting schools.

### **1.3 AIM OF THE RESEARCH**

The general aim of this research is to gain a clearer understanding from school principals as to how they think the IDSO can best support them.

In order to realise the aim of the study, the following specific objectives have to be achieved, namely to:

- find out from participants what they understand the IDSO's role to be;
- find out from participants how they experience the current role of the IDSO;
- explore what role participants would like the IDSO to play in supporting schools.

### **1.4 RESEARCH METHODOLOGY**

As my interest lies in the perceptions of school principals regarding the role of the IDSO, the research is located within the interpretive paradigm (Creswell, 2009:8; Henning, Van Rensburg & Smit, 2004:103). A case study method was used for this research (Walsh, 2001:52). My case is IDSOs.

I conducted individual interviews with six selected school principals within JW in Gauteng. The interviews comprise open-ended questions that allowed me to generate a variety of rich narrative data (Walsh, 2001:12). This assisted me in my understanding of what school principals think the IDSO can do to support them. Data derived from the interview sessions were captured primarily by means of audio-recordings (that were transcribed), as well as written notes and observation.

The research community and those using the findings of this research have a right to expect that the research be conducted rigorously, scrupulously and in an ethically defensible manner. Ethics are required to ensure the integrity of the knowledge produced and to promote the practice of ethical responsibilities towards participants (O'Leary, 2004:50).

## **1.5 OUTLINE OF THE STUDY**

### **Chapter One**

This chapter provides the motivation for the research as well as a description of the problem statement. In addition it outlines the aims of the research and the methodology used in the study.

### **Chapter Two**

Chapter two involves a literature review to construct a conceptual framework of school district supervision internationally as well as in South Africa, with particular reference to the inspectorate in the United Kingdom and the superintendency in the USA. The latter part of the literature review examines the supervisory role of the IDSO in school districts in South Africa. The chapter is then concluded with a brief summary.

### **Chapter Three**

This chapter concentrates on the research methodology utilised in investigating school principals' experiences and expectations of the role that the IDSO fulfils in supporting schools. This chapter presents and defends the research approach used. Explanation is given of the research method, sampling procedure, data gathering technique, data analysis procedure, ethical implications and the limitations to my research.

### **Chapter Four**

Chapter four concentrates on the outcome of the data obtained during the interviews. The interviews were analysed and the data presented in salient themes that emerged from the responses.

### **Chapter Five**

This chapter provides a discussion of the data based on the analysis in chapter four. The significant points of the study are also summarised in the form of recommendations and topics for future research.

## 1.6 SUMMARY

In this chapter a framework for the research was presented. It was argued that schools require effective leaders and managers if they are to provide the best possible education for their learners. The research is motivated by the need to explore the role of districts in sustainable school improvement efforts and more specifically the role of the IDSO in maintaining high levels of school leadership and management, thus creating a supportive environment in which quality educational programmes can be provided. Firstly, the background of the research is stated. Secondly, this chapter provides the statement of the problem, whereby the core purpose of educational districts were highlighted as well as the obstacles preventing districts from fulfilling their role in school support. The aim of the research is to gain a clearer understanding from school principals as to how they think the IDSO can best support them.

In the next chapter, the relevant research literature on the current thinking and practice in education supervision internationally as well as in South Africa is discussed.



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## CHAPTER TWO

### LITERATURE REVIEW

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#### 2.1 INTRODUCTION

As argued in chapter one, the leadership and management provided by the IDSO fulfils a vital role in maintaining high levels of support in assisting school principals to create an environment in which quality education programmes can be provided to learners. Research has, however, shown that in practice this does not occur (Bush, 2007:391).

This chapter focuses on the current thinking and practice in education supervision internationally as well as in South Africa. It is approached from a historical perspective. I begin by reviewing the origin of the inspectorate and reflect on the historical and current trends in the development of school inspection. The latter part of the literature review examines the supervisory role of the IDSO in school districts in South Africa. The chapter is then concluded with a brief summary.

#### 2.2 THE CONCEPT OF SUPERVISION

Supervision in the original sense of the Latin word *supervideo*, means “to oversee” (Pawlas & Oliva, 2008:4). The authors construe that a supervisor “demonstrates techniques, offers suggestions, gives orders, evaluates employees’ performances and checks on results” (Pawlas & Oliva, 2008:4). This correlates with the earliest recorded instances of the word supervision that establishes the process to entail “general management, direction, control and oversight” (Glantz & Behar-Horenstein, 2000:11).

Acheson and Gall (1992:27) define supervision as the process of assisting the educator to reduce the discrepancy between actual teaching behaviour and ideal teaching behaviour with the aim of improving teaching. Similarly Pawlas and Oliva (2008:10) describe modern supervision as “any service offered to teachers that eventually results in improving instruction, learning and the curriculum”, whilst Wiles and Bondi (1996:15) view supervision as a “general leadership role to coordinate all school activities concerned with learning”.

In recent years educational supervision has become a dominant approach when evaluating schools, be it through panels of inspectors, self-evaluation instruments or self-evaluation with external moderation (Wilcox & Gray, 1996:111). The purpose of modern day supervision is to develop professional learning communities into work teams which are able to acquire new skills and knowledge that will provide them with improved insight into their natural work and learning environment (Pawlas & Oliva, 2008:20).

In the next section I examine the development and implementation of school inspection in England.

## **2.3 THE GLOBAL TRANSITION IN SUPERVISION: A HISTORIC OVERVIEW**

### **2.3.1 Development of school inspection in England**

#### **2.3.1.1 Inspection by Her Majesty's Inspectorate (HMI)**

Records of school supervision in England date back to 1839 with the establishment of the British school inspectorate by Her Majesty (HM) to ensure that government grants to elementary schools were allocated according to regulations (MacBeath, 2006:5). Edmonds (1999:33) reports that the first two inspectors were appointed under auspices of the church in England and both shared dual roles. Rev. F.C. Cook fulfilled a dual role of both secretary and inspector whilst Rev. H.F. Gray performed duties as principal and inspector (Edmonds, 1999:31). The instructions to inspectors of schools in 1840 defined their duties as “enquiring into applications to build or support schools; inspecting schools already aided by grants; and enquiring into the state of education in particular districts” (Wilcox & Gray, 1996:24). An extract from the minutes of the Committee of Council on Education 1840 - 1841 illustrates that the powers of the inspectors were very limited: “Inspection is not intended as a means of control, but of affording assistance...it is not to be regarded as operating for the restraint of local efforts, but for their encouragement; the inspector having no power to interfere, and not being instructed to offer any advice or information excepting where it is invited” (Wilcox & Gray, 1996:24).

As a result of the Revised Code for Inspection passed in 1862, inspectors were heavily involved in the direct examination of pupils. This code instituted 'payment by results' which made it profoundly unpopular with teachers as well as several of Her Majesty's inspectors (HMI) as it made a substantial proportion of the grant paid to managers of schools dependent on pupils' ability to reach certain standards in reading, writing and arithmetic (Edmonds, 1999:142; Shaw, Newton, Aitkin & Darnell, 2003:64; Wilcox & Gray, 1996:24). The role of the inspector had effectively moved away from that of adviser to that of tester and enforcer of the 'code'.

The turn of the twentieth century saw the granting of increased freedom to elementary schools, and the gradual development of secondary schools as a consequence of the 1902 Education Act. The inspection of secondary schools, with their larger range of subjects and specialist staff, required a somewhat different approach from that adopted in elementary schools. It usually involved a day visit by one or sometimes two inspectors. The principle method of secondary school inspection was 'full inspection' which was carried out by a team of inspectors spanning several days that resulted in a formal report (Wilcox & Gray, 1996:25).

By 1912 nearly all secondary schools receiving grants had been comprehensively inspected. The frequency of inspection, however, was not sustainable and a shortened version of the full inspection was introduced in which HMI considered selected aspects requiring attention (Wilcox & Gray, 1996:26). Full inspections were discontinued during the First World War (1914 - 1918) and from then onwards full inspections occurred every ten years instead of every fifth year. In the ensuing years the cycle of full inspection continued to decline and by the late 1950's they had virtually ceased to exist. The low profile of HMI resulted in questions being raised regarding the inspectorate's future and its continued existence. Wilcox and Gray (1996:26) wrote that a Parliamentary Select Committee recommended that a full-scale formal inspection should be discontinued, except in extraordinary circumstances, and that the greater share of inspection should be left to the inspectorates of local authorities.

As stated by Davis, Downe and Martin (2001:6) local authorities were self-governing structures responsible for services, under a minimal amount of central oversight. Although legislation made provision for conferring powers to local authorities to

determine institutional structures, powers, and obligations; command and control mechanisms featured strongly in many of the inspection regimes to which local authorities were subjected.

Towards the late 1960's the state of public education, financial crises and cutbacks in education and the emergence of educational accountability created a climate for HMI to re-establish a successful national role in which informal visits and 'short' inspections (dealing with general aspects of schools, not with individual subjects) were executed (Wilcox & Gray, 1996:26). Marshall (2008:70) wrote that by the early 1970s, HMI were carrying out fewer local inspections, and were devoting more time to inspections at the national level – often pursuing the concerns of Ministers or the Department of Education and Science through nominal surveys, based on the inspection of individual schools. These school inspection visits were generally short, focused inspections, designed to present a national picture of a particular aspect or subject of educational provision. To a great extent school inspection consisted of a one-day visit by a single inspector, culminating in a discussion with the head teacher in which relevant issues were raised. A 'note of visit' was written for the inspectorate's school file and, unless there was some special concern or interesting development, the information preceded no further. The school did not receive any written outcome pertaining to the visit and generally there was no planned follow-up inspection (Marshall, 2008:71).

During the early 1980's issues concerning the accountability of schools were increasingly debated. The decision in 1983 to publish inspection reports of schools (and colleges) and an annual report by the Chief Inspector raised the profile of HMI and inspection in general (Shaw et al., 2003:63). It also brought their methods and activities into the public arena and provided a preview of the influence the publication of reports could have on schools' behaviours and reputations. Attention was given to the functions of HMI as well as to local inspectorates regarding the services rendered to schools. Their functions included monitoring of assessment standards; the provision of support to teachers through in-service training, curriculum development and direct advice to individual institutions (Wilcox & Gray, 1996:27). The nature of the inspection service radically changed after the Education Acts of 1986 and 1988. Schools were given more freedom to manage their own affairs but

were required to teach a National Curriculum. Simultaneously they were to be held accountable to stakeholders for what they did (Shaw et al., 2003:63).

The end of 1990 saw a change in the role played by inspectors. The introduction of shorter, sharper inspections in schools in conjunction with the collection of self-evaluation evidence as the starting point for future inspection were amongst the innovative changes brought to the inspectorate so as to improve its functionality (MacBeath, 2006:6). The introduction of the National Curriculum together with the Education Schools Act of 1992 revolutionised the inspection of schools in England and Wales. The latter resulted in the establishment of a non-ministerial government agency, the Office for Standards in Education (OFSTED), whose slogan was 'improvement through inspection' (Marshall, 2008:72).

### **2.3.1.2 The OFSTED approach to school inspection**

Maw (1998:145) regards the introduction of a new inspection system by OFSTED as one of the most important ways in which accountability relations in schools and between schools and outside bodies could be changed. The adopted model of inspection was the most comprehensive ever and it covered virtually all aspects of a school's activities. Prior to the aforementioned, inspection was the exclusive responsibility of the national inspectorate HMI, and the inspectors of the local education authorities who determined which schools would be inspected by the inspectorate team (Wilcox & Gray, 1996:1).

Wilcox and Gray (1996:2) reported that inspection was carried out by independent inspection teams, each led by a Registered Inspector (Rgi) and each team had to include at least one 'lay person' who had no professional involvement in the provision or management of education. Under new regulations all schools, including special schools, had to be inspected once every four years and the resulting data was utilised to 'measure the temperature' of the system (Marshall, 2008:72). After an inspection the individual schools and local education authorities were called to account and had to provide parents with a report. The governing body of a school was required to produce an 'action plan' which set out its intended procedures for implementing the inspection findings (Marshall, 2008:72; Wilcox & Gray, 1996:2).

Wilcox and Gray (1996:2) indicated that the system of inspection inaugurated by the 1992 Education Act represented an unprecedented attempt to apply a universal model of inspection of ambitious frequency and comprehensiveness carried out by independent inspectors, drawn from a wide range of backgrounds. OFSTED inspection largely replaced HMI and local authority inspection in the United Kingdom (UK) (Maw, 1998:145).

In 1999 OFSTED announced that the period of notice given to schools before an inspection was to be reduced from two terms to between six and ten weeks, as part of a new differentiated system of school inspection. The key element of the new arrangement was the introduction of a 'short' inspection for the most effective schools, a proposal which was widely welcomed (MacBeath, 2004:20). Ferguson, Early, Fidler and Ouston (2000:92) reported that the majority of school heads in Great Britain responded positively towards an inspection process that would make provision for inspection teams to provide assistance and advice to schools. They expressed the belief that an advisory role for inspectors would most definitely constitute a major improvement in school management (2000:93). This was the beginning of a new relationship between the inspectorate and schools.

### **2.3.1.3 The new relationship between the inspectorate and schools**

In 2004 OFSTED published a consultation paper on 'The Future of Inspection' wherein they proposed shorter but more frequent inspections which would be undertaken with minimal or no prior notice to schools. The consultation document was opposed by Britain's National Union of Teachers (NUT). They presented their own document which influenced the approach for future school inspections. As a result of the opposition by NUT, a new policy was introduced in the 2005 - 2006 school year to ensure a 'New Relationship with Schools' (NRwS) in England (MacBeath, 2006:2). According to MacBeath (2006:5) the NRwS promised to allow schools greater freedom in defining clearer priorities for themselves. It had an increased emphasis on self-evaluation with regular feedback to its stakeholders to render an account of quality and performance (MacBeath, 2004:21). The inspection was firmly linked to the school's Self-Evaluation Form (SEF) which formed the basis for the inspection (Marshall, 2008:73).

In contrast with the OFSTED phrase ‘improvement through inspection’ (Wilcox & Gray, 1996:4), the NRwS acknowledges that inspection in itself does not empower schools to effect improvement. Instead NRwS places self-evaluation at the centre of school improvement which brings with it a new role for the inspectorate. OFSTED viewed external inspection and self-evaluation as complementary activities (Rudd & Davies, 2000:1). In this new relationship the inspectors would no longer be the “sole arbiters and narrators of the school’s story” but rather act as mediators, encouraging and supporting “schools to speak for themselves” (MacBeath, 2006:2).

Wilcox and Gray (1996:5) are of the opinion that the underlying strategy of school improvement should be to make schools more accountable to the community of stakeholders supporting them, and for stakeholders with a vested interest to place pressure on schools to improve. David Miliband, the Minister of State for School Standards in the UK, articulates the importance of support from the community to ensure success in school improvement. In his opinion, accountability drives everything. “Without accountability there is no legitimacy; without legitimacy there is no support; without support there are no resources; without resources there are no services” (Miliband, 2004). Accountability therefore drives and legitimises school improvement plans.

MacBeath (2006:8) states that the NRwS calls for improved standards as the fundamental purpose of self-evaluation; it provides teachers with tools which assist in evaluating pupils’ learning and the extension of the school’s capacity to respond to, and implement change. Both Greece and China adopted the NRwS self-evaluation model to improve their education policies.

Although many critics, such as Cullingford and Daniels cited in (MacBeath, 2006:5) have reason for maintaining a degree of scepticism towards OFSTED’s efficiency and impact, one should take note that the purpose of OFSTED and its system of reporting was essentially to monitor and report on the accountability of schools (MacBeath, 2006:5). From the outset, OFSTED’s purpose was to monitor school improvement, “Our intention...is to do more than regulate; it is also to promote good inspection through improvement of the inspection arrangements and above all, to provide a system and conditions which facilitate school improvement” (Coopers and Lybrand/OFSTED, 1994:35).

Marshall (2008:72) claims that despite the criticism, there have been some significant positive outcomes. The most obvious is that schools deemed to require special measures, as they were judged by the inspection team to be offering an unacceptable standard of education, have in most cases improved. Rudd and Davies (2000:5) concur that interviews with staff in schools revealed that self-evaluation, in its various forms, has been a positive experience for head teachers and class teachers in many ways.

In the next section I discuss the supervisory model of the Superintendency in the United States of America.

### **2.3.2 The Superintendency in the United States of America**

The USA too has a longstanding history of school supervision but, unlike the British education system where supervision is performed by school inspectors, the American school system refers to such officials as Superintendents.

The position of superintendent came into being because prior attempts to administer school systems had, in effect, failed (Blumberg & Blumberg, 1985:13). Not only were schools, in both cities and rural towns, governed by lay boards, but boards had also assumed responsibilities for the day-to-day operation of the schools (Callahan, 1966:14). Blumberg and Blumberg (1985:14) report that “lay committees often examined pupils, inspected privies, chose textbooks and methods of teaching, certified and selected teachers and decided on the myriad details of running schools”.

The rapid growth of the American population coupled with the USA’s commitment to universal, free, public education had produced a critical situation in schools by 1900 (Callahan, 1966:31). The lack of sufficient facilities and inadequately qualified teachers in rural areas together with the sheer number of students to be educated in city schools, as well as evidence of inadequate financial support, painted a disheartening picture for American schools. These contextual factors limited lay committees in performing their duties. The need for assistance led to the appointment of superintendents (Callahan, 1966:47).

Although the term school superintendent is most readily associated with local districts in the USA, one must distinguish between three levels of authority that exist, namely that of state superintendent serving on the school board, the district superintendent that has jurisdiction over Public Education and the school superintendent that oversees the day-to-day operation of schools within the district (IEL, 2001:5).

### **2.3.2.1 The school superintendent**

The school superintendent is associated with the local school district, which encompasses a relatively small geographical area and oversees the schools within a specific community (Lunenburg & Ornstein, 2000:284). Inspection, conducted by superintendents between 1850 and 1930, aimed at administering schools through bureaucratic practices. The reasoning was to achieve quality schooling by eradicating inefficiency and incompetence amongst the teaching fraternity (Pawlas & Oliva, 2008:5). This bureaucratic model of school organisation became firmly rooted in the school system with the superintendent at the top and the teacher at the bottom of the hierarchy (Pawlas & Oliva, 2008:8).

Lunenburg and Ornstein (2000:305) state that the superintendent's powers are broad and the duties are numerous and varied. He or she is usually considered a manager of the entire district with respect to school budgets, planning, curriculum and instructional programmes, building needs and maintenance of schools. He or she also makes recommendations regarding the employment, promotion and dismissal of personnel. In addition the superintendent is responsible for the day-to-day operation of all the schools within the district and serves as the major public spokesperson for schools (IEL, 2001:5). Primarily, it is the school superintendent's responsibility to advise the school board and keep members abreast of problems (Lunenburg & Ornstein, 2000:306). Lunenburg and Ornstein (2000:305) view the school superintendent as the "executive officer of the school system, whereas the school board is the legislative policy-making body".

During the first half of the 20<sup>th</sup> century the supervisory role of district management was defined by "the four Bs: Bonds, Budgets, Buses and Buildings". By the 1970s, it had become "the four Rs - Race, Resources, Relationships and Rules". Priorities changed once again in the 1980s when the contemporary school reform movement

gained traction (IEL, 2001:1). It was only during the late 1980s (1985 to present day) that superintendents started spending a considerable amount of time visiting and supervising schools, implementing democratic human relationship strategies to assist teachers overcome difficulties in the classroom. Dynamic actions such as 'service, cooperation and democracy' were implemented to improve the supervision of the continued growth of the child, the teacher, the supervisor and the parent (Pawlas & Oliva, 2008:10). Today, district leaders must involve themselves in a host of different matters, namely "the four As: Academic standards, Accountability, Autonomy and Ambiguity" and "the five Cs: Collaboration, Communication, Connection, Child Advocacy and Community Building" (IEL, 2001:1).

The vulnerability of the superintendent's position has always been a point of contention. Usdan, McCloud, Podmostko and Cuban (2001:26) noted that "district leaders are in an arena that is perpetually besieged by a *potpourri* of often conflicting forces: state laws and regulations, federal mandates, decentralised school management, demands for greater accountability, changing demographics, the school choice movement, competing community needs, limited resources, partisan politics, legal challenges, shortages of qualified teachers and principals and a general lack of respect for the education profession". Given these often restraining circumstances, the need for informed, committed district leaders who can propel school systems toward high levels of achievement for all students is greater than ever (IEL, 2001:26).

The responsibilities delegated to district offices have profound implications for the ideal role that a superintendent should fulfil. In relation to the encompassing themes of accountability and support in defining the superintendent's role, it seems that the support role has been placed in the background with most activities lined up with demands of accountability. School board members therefore are required to appoint superintendents who can skilfully fulfil key leadership responsibilities. They need to support district goals for achievement and instruction so as to ensure success for school-level leadership.

In the last part of this literature review I focus on education in South Africa.

## **2.4 EDUCATION SUPERVISION IN SOUTH AFRICA**

Every nation has its own distinctive educational system with facets of its own making (Behr, 1988:9). These facets could include social, economic, legal and historical contexts. Similarly the education system in South Africa represents patterns found in the education system within a western tradition of the UK and the USA.

### **2.4.1 The historical context of South African education**

The Europeans who colonised the Cape during the seventeenth and eighteenth centuries brought with them a tradition of religious education (Behr, 1988:10). According to Malherbe (1925:21) it is this very Protestant religion with a strong Calvinistic trend that became powerfully embedded into the network of South African life. Behr and Macmillan (1971:3) state that “formal schooling as was available was mainly religious and under direct control of the Dutch Reformed Church”. Educational provision in South Africa was on a small scale until well into the second half of the nineteenth century (Behr, 1984:5).

It was not until the 1820s that a system of secular schools in the British tradition, sponsored by the Governor, Lord Charles Somerset, began to take shape. The appointment in 1839 of an impartial full-time official, known as the Superintendent-General of Education, signalled the transfer of responsibility for education from church to state (Behr, 1984:6; Behr & Macmillan, 1971:4).

Behr and Macmillan (1971:7) reported that at the National Convention in 1909 discussion began on a new Union for South Africa, and the unification of the education system was a major point of debate. The majority of the delegates at the National Convention favoured the taking-over of education by central government. When the four self-governing colonies came together to form the Union of South Africa in 1910, each had established systems of education, their concern being largely with primary and secondary education and teacher training (Behr, 1984:20; Behr & Macmillan, 1971:7; Malherbe, 1925:395).

#### **2.4.2 Systems of control in South African education**

In South Africa, centralised control of education existed from the seventeenth century but it was not until the nineteenth century that local forms of control began to emerge through school boards. After the South African War (1899 – 1902), Lord Selborne, the High Commissioner of South Africa appointed in 1905, recognised the tradition of the Republics for local authority in education (Booyse, Le Roux, Seroto & Wolhuter, 2011:175). He made local control a key feature of the regulations which became the basis of the Smuts Education Act, Education Act 25 of 1907 (Booyse et al., 2011:176).

Lord Selborne initiated the appointment of school boards in all schools as well as the implementation of advisory school boards for larger magisterial districts (Behr & Macmillan, 1971:47; Booyse et al., 2011:175; Malherbe, 1925:128). The Act of Union resulted in a considerable curtailment of powers of the superintendents of education and, in effect, provincial executive committees started functioning as councils of education.

According to Behr and Macmillan (1971:47) the school boards were to supervise buildings and grounds, and to offer advice on the appointment of teachers, but not their dismissal. The duties of the advisory school boards were to exercise supervision over local provincial educational institutions and to act as a channel for negotiation between school committees and the Director of Education on various matters, such as the provision of sites for buildings; the restriction of admissions to any school and the establishment and maintenance of transport schemes (Behr & Macmillan, 1974:47; Rose, 1973:23). Booyse et al. (2011:188) postulate that school boards also administered the funds for the maintenance and care of buildings, furniture and equipment. Copies of reports by inspectors of schools were submitted to the boards which then made recommendations to the director concerning such reports or on any matter submitted to the board in writing concerning the welfare of any institution under the supervision of the board (Behr & Macmillan, 1971:49; Booyse et al., 2011:188).

The abovementioned process became a daunting task for school boards and directors of education and the idea developed to introduce a system where school inspectors could assist with the administration of schools in each province.

### **2.4.3 School inspection in South Africa**

In 1892 Sir Thomas Muir was appointed as Superintendent of Education in South Africa and held the position until 1915. Muir was responsible for initiating a number of changes that had a marked influence on education; one of which was the introduction of annual school inspection (Behr & Macmillan, 1971:116; Malherbe, 1925:142).

Behr and Macmillan (1971:70) are of opinion that inspection was an important part of the control and supervision of education. The pattern of inspection throughout the Republic of South Africa (RSA) was largely the same. Each provincial department of education appointed experienced principals and teachers to the inspectorate and chief inspectors were appointed through the Public Service Commission (Behr & Macmillan, 1971:71). Unlike the practice in other countries where different inspectors were appointed for different types of schools, inspectors in South Africa had jurisdiction over all schools in their circuits or districts. During inspection visits, a group of inspectors would visit a primary school for inspection, and inspectors from throughout the education district were assembled for high school inspection so as to adequately cover specialist subjects (Behr & Macmillan, 1971:71).

The evolutionary change in the functions of the school inspector in South Africa is noteworthy. Initially inspectors examined and promoted each individual child, but soon after 1920 this system was abolished, as principals were given greater responsibility for the internal conduct of schools. The 'modern' inspector had two functions, namely guidance and administrative control (Behr & Macmillan, 1971:71). The trend moved towards inspection of the school as a corporate unit and towards creative aspects of advice, guidance and inspiration. This was an extremely delicate task and was a test of the inspector's suitability for his work and of his personality. The school inspector therefore needed to possess a comprehensive and successful background as a principal, be a man of culture and expansive sympathies, who was able to work with teachers and appreciate that each school had its own nature and individuality. Simultaneously, in the public interest, the school inspector had to ensure that reasonable standards were achieved (Behr & Macmillan, 1971:72).

The workload unfortunately made it increasingly difficult for inspectors to cover the administration of schools. According to Behr and Macmillan (1971:71), in 1913 there

were 20 inspectors for 64,000 school children; in 1937 there were 25 for 164,352; in 1955 just over 30 inspectors for nearly 281,000 children and 40 inspectors for 331,000 pupils in 1962.

#### **2.4.4 School inspection during the 'apartheid' years**

Pells (1954:144) observed that the majority of schools for black people by 1935 were state-aided missionary schools, each under the control of a missionary manager. The manager supervised the moral and religious instruction of the pupils, ensured that the school buildings were kept in good repair, nominated teachers to be considered for appointment by provincial education departments and furnished returns and statistics as and when required (Behr, 1988:29). However, Fataar (in Kallaway, Kruss, Donn & Fataar, 1998:74) states that the provision of missionary schooling, before the introduction of mass schooling for Africans, was limited. It was only with the introduction of the apartheid education system in 1955 that provision for mass schooling for Africans came into being. In the Transvaal there were also tribal or community schools, not connected with missionary organisations, but under the direct control of the local circuit inspector of black schools (Behr, 1988:30). In the case of these schools, the inspector acted as the manager. The professional supervision and inspection of schools was carried out by white inspectors of education, assisted by black supervisors of schools. The latter can best be described as a roaming principal, required to assist in improving methods of teaching in schools (Behr, 1988:30).

According to Fataar (in Kallaway et al., 1998:76) the first two decades (during 1960 and 1970) of Bantu Education witnessed an increase in African enrolments in "tandem with the separate development notion of grand apartheid"; with substantial increases during the 1970s and 1980s. It was not until 1981 that the first black circuit inspector was appointed - but only under the supervision and auspices of a white circuit inspector. It was the responsibility of the inspector to ensure that the teaching and learning strictly conformed to the content specifications of the apartheid syllabi. More broadly though black inspectors (responsible for a group of schools in a demarcated circuit) had the task of ensuring compliance with apartheid in all aspects of school functioning - from governance and administration, to curriculum and assessment (Jansen, 2004:53).

Following the formal adoption of the 'apartheid policy' in 1955, school boards had the legal responsibility to appoint, discipline and dismiss teachers (Hartshorne, 1992:289). The school board of each school consisted of members selected and approved by government (Jansen, 2004:52). Hartshorne (1992:289) portrays the period between 1955 and 1979 as an unhappy time for teachers. School boards, responsible for the appointment and promotion of teachers, did not do much to advance the interests of teachers nor did they organise negotiations with the central department. This resulted in the progressive deterioration of the morale of teachers between 1955 and 1980 (Hartshorne, 1992:289).

Jansen (2004:53) writes that as from the mid-1970s inspection was expanded throughout the education system to enforce compliance in the face of growing resentment against the apartheid education policy, which culminated in the Soweto and later national uprising of youth against the state. Panel inspections of institutions, together with subject assessments, were established to monitor and enforce state policy with regard to the curriculum and administration of public schools. The core curriculum for all schools, white and black, was reinforced through the dual mechanisms of state-driven inspections and the state-moderated examination system.

Morrow (2007:150) states that the education system during the apartheid era was complex, reflecting a racially fragmented society, with a differentiated system of inspection, control and appraisal across the racially determined departmental sectors. White schools, for example, were largely untouched by the notorious inspectorate system which operated in the TBVC states (independent states in South Africa: Transkei, Bophuthatswana, Venda and Ciskei) and in the DET schools (Department of Education and Training) before the 1980s. The experience of appraisal and the relationship between educators and the inspectorate varied considerably across the 18 education departments. The inspection employed by the white and Indian departments, although not entirely unproblematic, was largely more positive (Thurlow & Ramnarain, 2001:93). Nevertheless, this form of inspection with the goal of enforcing compliance was unpleasant for educators who often viewed these inspections with suspicion, as well as discontent and disillusionment. Many teachers lived "in fear of the inspectorial or subject advisory visits" (Swartz, 1994:36).

Oral history testimony of educators at the time attests to this, it was “inspectors ... [who] played a central role in subduing teachers and holding them to account” (Soudien, 2002:217).

Jansen (2004:53) is of the view that the ‘Soweto Uprising’ of 1976 led not only to a rejection of Afrikaans being expanded into black schools as a medium of instruction, but also generated an antagonism amongst black students and teachers against the inspectors responsible for the administration of apartheid schooling. Inspectors visiting black township schools would invariably be confronted with hostility and, in several cases, driven away or attacked (Morrow, 2007:142). Eventually the DoE simply withdrew this system of inspection in black township schools (given the violence that it unleashed against the state and its officials) leaving behind a telling legacy of suspicion and resentment against state involvement in the supervision and monitoring of teachers and teachers’ work within the school environment (Ndlovu, 1998:14). As from 1984, and reaching crisis proportions at the end of 1985, black schooling increasingly broke down and for a proportion of black students, schooling had effectively ceased to exist (Morrow, 2007:144).

By the time of the un-banning of the liberation organisations and the release of Nelson Mandela in 1990, education protests continued to target school inspectors and subject advisers, barring them from school grounds. Chisholm (1999:112) states that protests in 1990, took the form of “stayaways, chalk-downs, marches to regional offices, submissions of lists of grievances and sit-ins” to prevent departmental officials from visiting schools. In 1991 and 1992 teacher unions embarked on strike action and continued with the campaign to eject symbols of an illegal department from school grounds (Chisholm, 1999:112). Jansen (2004:54) is of the opinion that this is a legacy that would come to haunt the post-apartheid government long after the democratic transition of 1994, and the subsequent pronouncement of a new education and training system. From 1994 to 1997 many schools were ‘no go zones’ for school inspectors and as such there was no mechanism for the DoE to hold educators accountable for their work. In fact very little, if any, form of evaluation took place in schools in the 1980’s and early 1990’s (Williams, 2003:5).

In an effort to implement mechanisms for improved evaluation of education standards and quality of teaching provided at schools, efforts were made to

restructure the fragmented education segments. This resulted in the formation of education districts whose primary function was to support schools.

#### **2.4.5 The role of districts in the South African education system**

During the early period of post-apartheid education (1994 - 1999) the apartheid administration structures were slowly dismantled. This gradual transformation was in part a response to the political environment that required reconciliation between (in the main) African and Afrikaner nationalists (Jansen, 2004:54). After the 1994 elections, a fundamental shift took place in school governance: a shift away from top-down management towards school-based management. This shift enabled stakeholders to express authority in the system, to “achieve equitable access to education and improve the quality of provision” (NTTEMD, 1996:13). The 18 racially divided departments each representing a different system of school supervision, that worked with panels of inspectors, had to be restructured into nine provincial departments (Chisholm, 2004:1; Steyn, 2002:261). Although the administrative culture of the previous system still extended into many parts of the new government bureaucracy, the distribution of personnel had dramatically changed by 1999 (Jansen, 2004:65).

In 1999 a national conference on districts was convened by the national department of education to provide momentum to the District Development and Support Project (DDSP), one of the projects established under the Education Policy Reserve Fund (Mphahlele, 1999:32). The DDSP signaled a shift in focus on the part of the DoE from individual school improvement to district development. Mphahlele (1999:32) argued at the time that “given the authority to local schools by the South African Schools Act (SASA), districts seem to be disempowered in the running of schools and supporting teaching and learning in schools”. The DDSP thus aimed to develop capacity at the level of Circuit and District Offices so that effective support could be provided to schools. In the presentation of the impressive range of interventions funded by the DDSP (2003), projects focused on improving the quality of curriculum practice, district/school management, whole school and district development, and the internal functioning and capacity of districts (Mckinney, 2009:7).

Narsee’s (2006) case study of the role and functioning of a large district office in the GDE offers a useful picture of the range of functions that a district office might offer.

The district is responsible for public schools, independent schools, Early Childhood Development (ECD) and Adult Basic Education (ABET) sites. The district office is managed by a district director and two sub-units (curriculum information and policy and planning) are run from the director's office. There are six further sub-directorates, each with its own administrative and professional staff: curriculum development and support (CDS), education support services (ESS), finance and administration, human resources management (HRM), human resources administration (HRA), and institutional development and support (IDS). The IDS officials are responsible for the overall functionality of schools and are in fact managers of principals and schools (Narsee, 2006:118).

McKinney (2009:2) states that recent assessments of the local schooling system point to a number of challenges at the level of district functioning. Districts are generally not perceived to be fulfilling their potential as arenas of crucial support to schools. A recurrent refrain heard in both the international and local literature on districts is the tension between their dual roles of accountability and support in relation to schools. In South Africa there is evidence that a particular form of accountability (in the guise of policy compliance) has taken precedence over support to schools.

## **2.5 SUMMARY**

Formerly districts were authoritarian structures, which were dependant on higher authorities for decisions and modes of operation. In essence, they were administrative units 'functioning as post offices passing down' decrees from above (Khulisa & CEPD, 2003:11). Taylor, Muller and Vinjevold (2003:127) regret the fact that the district has been neglected in terms of "setting the policy direction and building the capacity required for playing its appropriate role in improving the quality of schooling". Chinsamy (2002:3) is of the opinion that the failure in the education system is not in the arena of policy formulation, but of policy implementation.

The head offices of provincial departments of education are not in a position to adequately pressure and offer support to schools, as they are largely staffed for the purposes of policy formulation. The gap between policy formulation by national and provincial departments of education and the implementation thereof by schools, is regarded as the primary reason for the failure of transformation in education.

Chinsamy (2002:4) furthermore expresses the view that it is the responsibility of the intermediate structure between the head office and the schools - the circuit and district office - to fulfil this role. Whilst there seems to be consensus that districts can only successfully influence school reform if the improvement of teaching and learning at the classroom and school level is central to their work, there is little evidence of this kind of focus in the current role and functioning of districts in South Africa (McKinney, 2009:3).

In chapter three I explain the research design and methodology used in this study.



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## CHAPTER THREE

### RESEARCH DESIGN AND METHODOLOGY

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#### 3.1 INTRODUCTION

The purpose of this study was to investigate principals' experiences and expectations of the role that the IDSO fulfils in supporting schools. This chapter presents and defends the research approach used. Explanation is given of the research method, sampling procedure, data gathering technique, data analysis procedure, ethical implications and the limitations to my research.

#### 3.2 RESEARCH PARADIGM

The term paradigm, which is derived from the work of the historian of science Thomas Kuhn, refers to a set of very general philosophical assumptions about the nature of the world (ontology) and how we can understand it (epistemology) (Bickman & Rog, 2009:224). Not only does a paradigm embrace the philosophical assumptions of reality and knowledge, but also the values and the theories that locate, inform and support the orientation and manner in which research is conducted (Lichtman, 2010:7).

Neuman (2000:65) defines a research paradigm as “a whole system of thinking which includes basic assumptions, the important questions to be answered or puzzles to be solved, and the research techniques to be used”. According to Babbie (2008:34), a research paradigm provides the researcher with a framework for observation and understanding. This framework refers the researcher to a way of conducting research, based on what he or she sees and how it is understood.

In the research community there are a number of generally agreed upon research paradigms. There is, however, no unanimity as many writers define paradigms according to their specific context which includes specific methodological strategies (Bickman & Rog, 2009:224). At the most abstract and general level, examples of such paradigms are philosophical positions such as positivism, constructivism, realism and pragmatism; each embodying very different ideas about reality and how knowledge can be gained about reality. At a somewhat more specific level, paradigms that are relevant to qualitative research include interpretivism, critical

theory, feminism, postmodernism and phenomenology. Furthermore within each of these paradigms, there are even more specific traditions (Creswell, 2009:6; Bickman & Rog, 2009:224).

### **3.2.1 The interpretative paradigm**

This study follows the interpretive paradigm in the tradition of qualitative research as the ultimate purpose of the project was to determine what principals expect from the role that the IDSO fulfils in schools. Interpretive enquiry aims at discovering the meanings and subjective beliefs underlying the actions of people (Henning, Van Rensburg & Smit, 2004:16; Creswell, 2009:8).

Henning et al. (2004:20) believe that an interpretive approach to research supports the theory that knowledge is not only constructed by observable facts, but also by descriptions of people's intentions, beliefs, values and reasons, meaning making and self-understanding. This concurs with Bassey's view of the interpretive researcher who recognises that by "asking questions or by observing they may change the situation which they are studying" (1999: 43).

The implications for an interpretive framework resulted in the use of in-depth interviews to capture 'insider' knowledge that is part of an interpretive methodology. Bassey (1999:44) states that the purpose of interpretive research is to advance knowledge by "describing and interpreting the phenomena of the world in attempts to get shared meanings with each other." Working in the interpretive paradigm afforded me the opportunity to find out what principals expect from the role of the IDSO. I relied on what the respondents told me and subsequently tried to interpret their reality from the recorded responses.

In the next section I describe the research design of the study.

### **3.3 RESEARCH METHOD**

As my investigation followed the interpretive research paradigm, a case study seemed the most appropriate method for this project. Qualitative research typically uses a case study design, implicating that data analysis focuses on the one phenomenon which the researcher selects to understand comprehensively. According to Creswell (2009:13), the term case study refers to a strategy of inquiry

where the researcher explores a unit of analysis, such as a program, an event, an activity, a process or one or more individuals. My particular case was the principals' experiences and expectations of the IDSOs.

In addition, Merriam (1998:19) states that case studies are distinguished from other types of qualitative research in that "they are intensive descriptions and analyses of a single unit or bounded system". It is in this sense that I refer to my study as a case study, focusing only on the principals' experiences and expectations of the IDSO's role as the one phenomenon I need to comprehensively understand. According to Walsh (2001:52), in-depth case studies of groups or individuals typically take place in their "natural setting". In view of this, the study was conducted on the school premises, the participants' natural setting. Henning et al. (2004:33) point out that the aim of a case study need not simply be for description sake, but also to see patterns, relationships and the dynamic that warrants the inquiry. A case is studied as the researcher suspects that there is something waiting to be unraveled in the case.

### **3.4 RESEARCH SITES AND PARTICIPANTS**

I conducted the research in JW. The selection of the case and the participants were both convenient and purposeful. Firstly I included schools from both 'town' and 'township' areas to collect information from. Secondly this was a convenient case as I was an IDSO within the district and the participants were available, after school hours, to meet for the interviews. In addition this was a case from which there was an opportunity to learn.

As this was a small scale study, I assumed that six interviewees would provide sufficient data to arrive at useful answers for my research question. I interviewed three male and three female principals from primary, secondary and special (LSEN) schools. There are no rules for sample size in qualitative inquiry. The sample size is based upon the purpose of the study, not on specific rules. The researcher looks at what he or she wants to know, what will be useful, what will be credible and what can be achieved within the constraints of time and resources (Cantrell, 1993:90; Patton in Anderson 1998:123).

Qualitative research typically uses small, information-rich samples selected purposefully to allow the researcher to focus thoroughly on issues that are important

to the study (Cantrell 1993:90). Purposive sampling based on the principals' experience as principals was used to select the six school principals (Babbie, 2007:184). I selected participants who, according to Gay and Airasian (2000:139), were "thoughtful and who have information, perspectives and experiences related to the topic of research". I selected interviewees who "could shed optimal light" on the issues that I was investigating (Henning et al., 2004:71). My sampling method was therefore in line with these expectations. The participants had been principals for between four and twenty four years. The majority of the research participants had thus been in management positions long enough to share their experiences of the working relationship that exists between schools and the IDSOs.

In pursuit of selecting research participants, the foremost consideration was not the setting (location of schools) as in ethnographic research. The focal motivation was the people. The purpose of the study was not to compare schools (or IDSOs) with each other, but simply to build a comprehensive picture of the research quest which entails the principals' experiences and expectations of the role of the IDSOs.

In the next section I discuss the data-gathering technique used.

### **3.5 DATA GATHERING**

My choice of data collection tools was influenced by the nature of the research, the research question and the research goals. Creswell and Plano Clark (2011:308) acknowledge that data collection procedures in qualitative research involve multiple sources that provide richness and depth to each case. In the context of interpretive case study research I could best obtain the data to achieve my research goal by using interviews as a qualitative data collection technique.

#### **3.5.1 Interviews**

My interest in the meaning of human behaviour and the relationships that exist in school systems prompted me to conduct semi-structured interviews to gather broad descriptions and interpretations from the participants. Babbie and Mouton (2006:277) view substantial descriptions as a method of providing the reader with sufficient detailed information on which to base judgements. I used semi-structured interviews as a chief data collecting tool. Babbie (2007:306) defines a qualitative interview as

“an interaction between an interviewer and a respondent in which the interviewer has a general plan of inquiry”. Likewise, Kvale (1996:125) describes it as “an interpersonal situation, a conversation between two partners about a theme of mutual interest”. It is a specific form of human interaction in which knowledge evolves through dialogue.

Creswell (2009:181) states that semi-structured interviews with generally open-ended questions allow the participants the freedom of expressing their views and opinions. A number of questions were asked to give interviewees the freedom to talk about their experience of the current role the IDSO fulfils, and to provide their views on what they understand the IDSO’s role to be as well as what support they expect from the IDSO. Using semi-structured interviews as a tool allowed the interviewees to talk freely about their experiences and feelings without me losing track. Cohen, Manion and Morrison (2000:267) state that interviews enable participants – be they interviewers or interviewees - to discuss their interpretations of the world in which they live and to express how they regard situations from their own point of view. Interviews therefore are a way of sharing the experiences one has had in terms of his or her context. This also assisted me to understand what principals expect of the IDSO.

I conducted all the interviews in the respondents’ place of work in order to ensure their personal comfort. All of the interviews took place in the offices of the selected principals. During the interviews, I used an interview protocol (Creswell, 2009:183) to ask questions, an audiotape for recording purposes and made descriptive notes (see Appendix D).

With the participants’ permission I audio-taped the interviews to record their responses, and I took field notes in case the recording equipment failed. Greeff (in De Vos, Strydom, Fouché & Delport, 2005:298) mentions that a tape recorder allows a much “fuller record” than notes taken during the interview. The length of the interviews ranged from 55 minutes to 90 minutes per interview. Fortunately, all the conversations were well-recorded with clear quality that made it easy to transcribe the recordings for careful analysis. The recordings reduced the possibility of misinterpretation and also allowed me to concentrate on the interview proceedings.

Although time-consuming, I thought it to be of value to transcribe the interviews myself. Transcribing was not just a straightforward and simple task. It involved judgment questions about the level of detail to include. Full transcriptions contributed to the validity of the data. Subsequent to the transcribing process I read through the transcriptions while listening to the recording so as to ensure the data was typed verbatim without error or omission. Henning et al. (2004:76) cite that working closely with the data will assist in the analysis that will come later.

Bassey (1999:69) suggests that interview transcriptions or reports be shown to interviewees as soon as possible after transcripts of recorded data are made so that participants have the opportunity to verify data for validity purposes. I therefore transcribed the recordings of each interview and requested the interviewees to verify the recorded data before continuing with the process of analysing the data.

### **3.6 DATA ANALYSIS**

The process of data analysis involves making sense out of text and image data (Creswell, 2009:183). Qualitative data analysis is therefore primarily an inductive process of organising the data into categories and finding relationships amongst the categories in order for the researcher to identify patterns and themes (Mouton, 2006:111). According to Henning et al. (2004:101) the overall coherence and meaning of data is more important than specific meaning given to certain parts and one should therefore consider using methods of data analysis that are more holistic, synthetic and interpretative. A holistic approach to data analysis also fulfils an important role in influencing the researcher's decision about what to consider as important, interesting and useful data (Walsh, 2001:13).

I read through all the data including my notes and transcriptions, and listened to the tapes again until I became immersed in the data. This assisted me in becoming familiar with the data, by moving me deeper and deeper into understanding the data, almost like "peeling back the layers of an onion", to make an interpretation of the larger meaning of the data (Creswell, 2009:183). This process of checking the transcripts against the audio-taped interviews assisted me in attaining a sense of the interviews as a whole.

Guided by my research aim (to explore principals' experiences and expectations of the IDSO's role) and the literature (chapter two), I was then able to identify significant issues. These issues, drawn from all six transcripts, were then used as themes to structure the data presentation in chapter four. Direct quotations of respondents' views were used to enhance the credibility and authenticity of findings. Quotations from data also assisted in retaining the "voice" of the respondents (Bassey, 1995:16). The identified themes then provided the basis for the discussion of findings.

I chose to present the issues as themes without commentary in chapter four, and discuss the findings in chapter five.

### **3.7 ETHICAL CONSIDERATIONS**

Although research investigations are associated with progress, discovery and improving our understanding of the world's knowledge, the researcher should pay attention to 'ethical' aspects that morally support research (Walsh, 2001:70). This refers to the standards of behaviour and practical procedures that the researcher is expected to follow in demonstrating his or her ethical conduct by respecting the rights, needs, values and desires of the informant(s) (Creswell, 2009:165). In order for the study to be ethical, I adhered to the ethics of research throughout the entire process.

A relationship of mutual trust was established with the participants by maintaining trustworthiness, integrity and honesty. These values were manifestations of my "respect for democracy ... respect for truth ... respect for persons" (Bassey, 1999:74). In respecting democracy, I obtained the participants' permission and informed consent (see Appendix A and B) and explained their right to withdraw from the project at any time should they need to do so. I explained that I would give them the opportunity to read and edit the transcripts of the interviews and also undertook to communicate the findings of the research to the participants.

In the quest for trustworthiness, I remained honest with both the participants and myself in the process of collecting and interpreting data. Bassey (1999:74) cautioned that in order to respect truth researchers "should not deceive others intentionally ... (and) should try not to deceive themselves and others unintentionally". To ensure

respect for the individual, I transcribed the interviews verbatim and quoted and acknowledged data collected appropriately. According to Bassey (1999:74) in this way, I would “recognize those persons’ initial ownership of the data and ... respect them as fellow human beings who are entitled to dignity and privacy”.

Furthermore I observed and maintained confidentiality and anonymity. Prior to commencing the research, I secured the permission of the GDE through the Director Knowledge Management and Research (see Appendix G). Before each interview I sought the consent of the participants and ensured their willingness to be audio-taped. I undertook not to divulge any information to anyone other than my supervisor and examiner without the participants’ consent, thus keeping the data strictly confidential. Pseudonyms were also used to ensure the anonymity of the respondents in all transcripts and reports so as to protect the identity of principals and schools, likewise protecting the confidentiality of documents obtained from school sites (Walsh, 2001:71). As O’Leary (2004:54) states, “confidentiality involves protecting the identity of those providing research data”.

### **3.8 VALIDITY AND RELIABILITY**

In qualitative research validity strategies refer to procedures that are used to demonstrate and convince the reader of the accuracy of findings (Creswell, 2009:235). Henning et al. (2004:148) postulate that validity asks the question whether, by using certain methods, we are investigating what we say we are investigating. Cohen et al. (2000:105) argue that in qualitative research, validity might be addressed through the honesty of both the researcher and the participants, as well as the depth, richness and scope of the data. Validity is therefore more than checking, whether what the respondents claim to be doing or experiencing at schools, is actually what is happening in real life. In open-ended research (such as this study) the likelihood of being lied to is trivial, since respondents do not essentially ‘know’ what you want to hear.

The interpretive approach ensured the validity of the smaller sample size as I had no intention of generalising the findings to a wider population. My concern was “to closely explore and understand the meaning individuals make of their experiences” (Janse van Rensburg, 2001:9). In the interpretive research paradigm, as Janse van

Rensburg (2001:8) states “the emphasis shifts from finding or discovering a single reality to presenting the multiple meanings which research subjects make of reality”. The use of in-depth interpretive interviewing provided rich descriptions, which enhance the validity of my study.

Wilkinson’s (2000:38) understanding of reliability refers to matters such as the consistency of a measure and the likelihood of the same results being obtained if the procedures were repeated. This rather positivistic understanding of reliability seems inappropriate to this study, since it is understood that interpretive research does not produce ‘results’ but findings, and these are rarely repetitive in the sense that an experiment may be repeatable.

For this study, reliability translated into the extent to which my findings emerge from the data and the extent to which the data captures the ‘reality’ projected by the research participants. Babbie (2007:144) concludes that in social research reliability is an epistemic criterion thought to be necessary but not sufficient for establishing the accuracy of an account or interpretation of a social phenomenon. This challenge has been addressed by quoting extensively from the raw data, thereby strengthening the reader’s sense of the people behind the data.

### **3.9 LIMITATIONS OF THE RESEARCH**

The interpretive nature of the research, coupled with the purposive selection of the school principals, might pose as a limitation as it implies a strong sense of subjectivity. However, the detailed descriptions generated by the data may assist the reader in having an informed view of how the conclusions were arrived at.

Furthermore the questions posed to interviewees were very relevant to my position as an IDSO and principals viewed the research topic to be very sensitive. I had to gain their confidence in order for them to speak openly about their past experiences so as to obtain information that could benefit the purpose of this study. I used positive affirmations such as ‘yes’ and ‘okay’ as part of the conversation. This must not be viewed as confirming the participant’s views or opinions, but merely as a way in which I attempted to put the participant at ease.

Unlike in quantitative research where the researcher is completely detached from the study to avoid bias, I acknowledge that in this qualitative study my values may have inevitably coloured the inquiry as I have previously interacted closely with the participants. This problem was dealt with by focusing on the purpose of my study that is to find out how school principals experienced the role of the IDSO in practice. In addition, I selected principals who did not belong to schools falling within my area of responsibility. This negated somewhat the power differential between myself and the principals. Finally, I conducted in-depth interviews with the participants and made generous use of their words in my report. A case record has been kept and I have left an audit trail by including an example of a transcript (see Appendix E).

### **3.10 SUMMARY**

In this chapter, I have provided an outline of my research approach. I employed the interpretive paradigm based on my research question and aims. I described the research method as a case study, which used the data gathering technique of interviews. Furthermore, I discussed the research sites and participants as well as the data analysis. I then outlined the achievement of research ethics such as confidentiality, anonymity, informed consent, honesty and integrity. Attention was also paid to the question of validity before highlighting some of the challenges of the study.

In chapter four, I present the data collected through interviews.

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## CHAPTER FOUR

### DATA ANALYSIS

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#### 4.1 INTRODUCTION

In this chapter I present the data generated from semi-structured, one-on-one, interviews. As explained in the previous chapter, I interviewed six school principals from primary, secondary and special (LSEN) schools. The purpose of the interviews was to record the participants' understanding, experiences and vision of the role of the IDSO.

Initially, I present a short profile of each research participant and then provide data in themes that emerged from the responses to the three questions. The three questions were specifically structured to obtain responses pertaining to principals' understanding of what the IDSO should be doing. Secondly, what their current experience entails, and thirdly, what role participants would like the IDSO to fulfil in supporting schools. In responding to a particular question the interviewees' answers overlapped at times. Instead of referring only to their understanding they also refer to current experiences or future expectations. I therefore organised the data to fit a particular question as well as used data in more than one theme where it was applicable to do so.

It should also be noted that I have improved muddled quotations of respondents in order for the reader to have a better understanding of words and phrases used by the interviewees, without changing the meaning of their responses. I always retained the 'voice' of the respondents.

I conclude with a brief summary of the chapter.

#### 4.2 PARTICIPANTS' PROFILES

The first participant has a B Ed (Honours) degree in Education Management. He has seven years experience as a principal of a primary school and has 23 years of teaching experience. In the seven years he has been principal at this particular ex-Model C school he has had four different IDSOs overseeing the school. He is referred to in this study as PR1.

The second participant is a female principal of an ex-Model C primary school. She has a Basic Education Teacher Diploma (BETD) and has an ACE in Educational Management and Leadership. She has eight years of experience as a principal at this particular school and has had two IDSOs in her career as principal. I refer to her as PR2.

The third participant referred to in this study as PR3, is a female principal from an LSEN school and she has had three different IDSOs in her four years of being the principal. She has a diploma in Special Education and in 2009 completed the ACE in Educational Leadership and Management.

Participant number four is a male principal of a LSEN school. He has eleven years of experience as a principal and has had four different IDSOs during this time. He has a B Ed (Honours) degree in Educational Management. He is assigned the code name PR4 in this report.

Participant five is a male principal who is principal of an ex-Model C secondary school. He has a Masters degree in Educational Management and is code-named PR5 in this report. He has been a principal for ten years and has had three different IDSOs during this time.

Participant six is a female principal with 24 years of experience as a principal of which 22 years have been at this particular township secondary school. She has a Basic Education Teacher Diploma (BETD). She has had five different IDSOs in the last ten years of principalship. The code name PR6 has been assigned to her.

### **4.3 DATA PRESENTATION**

I have organised this chapter according to the themes that emerged from each of the three interview questions listed in paragraph 4.1. I make generous use of direct quotations to give “voice” to the participants (Bassey, 1995:16). Guided by my research aim (to explore principals’ experiences and expectations of the IDSO’s role) and the literature (chapter two), I was able to identify significant issues. These issues, drawn from all six transcripts, were then grouped into themes to structure the data.

### **4.3.1 Understanding of the role of the IDSO**

The first question: *What do principals understand the role of the IDSO to be?* was intended to reveal what principals perceive the role or function of the IDSO to be. The participants' responses related to the importance of the IDSOs leadership role and the sharing of expertise with schools to support and develop principals, SMTs and educators in general.

#### **4.3.1.1 The support word is the main thing**

The responses made by principals showed their understanding of the IDSO's role to entail providing the principal and the SMT with guidance and support on an ongoing basis. However, all six interviewees had their own understanding of what 'support' entailed as well as the areas where support was needed.

One principal, PR5, explained that the IDSO's role is primarily to support the school:

"in the first place the role of supporting the school... in every matter where ever there may be a problem. The IDSO needs to support the school but also the principal and I think the most important thing for the principal is to know there is somebody who will listen, give him advice in order to make the best decisions in the interest of the school."

Another principal, PR3, described the IDSO as being a person that supports the principal and empowers the principal through knowledge sharing:

"the support word is the main thing for me. Knowledge, especially knowledge in a special school like our school, the LSEN School; to empower a principal by sharing knowledge with a principal."

Her understanding was that the IDSO's support to the school must be extended to educators at the school:

"when I'm talking about staff support I think it's important for the IDSO to come and sit, make an appointment to visit the welding centre, visit the building centre, sitting in the classroom to see what we're dealing with."

PR1 agreed that the supporting role of the IDSO should also extend to other structures within the school:

“I have been fortunate to have worked with an IDSO that have helped and supported us to cope with difficult parents.”

Another participant, PR6, regarded the supporting role of the IDSO to be to focus on policy compliance:

“assist with the policies and see to the implementation of those policies, I alone as a principal find it most difficult to implement some of the policies in the school.”

PR4’s focus for support from the IDSO was more on disciplinary matters:

“intervene in disputes between parents the school. Because I think these days, especially these days we really need bigger support from your side as an IDSO.”

PR4 also understood the support role of the IDSO within a labour relations framework:

“I don’t want the IDSO to be a disciplinarian or a labour person or the law (who must know the law and stuff like that) but to support. Once again in terms of this, it is about support.”

PR1’s words reflected despair: “you as the IDSO, you are my last link that I have before I go to Labour.”

Although the participants’ understanding of support varied in terms of their criteria of what it entails as well as areas in need of support, the general understanding was that the IDSO fulfils a key role in supporting principals.

#### **4.3.1.2 This is how you do it**

Most principals recognised that development offered by the IDSO to schools in areas pertaining to leadership, management and governance is important. Development and support are two closely related concepts that are intended to empower schools.

PR1 stated that it is imperative for the IDSO to:

“facilitate and guide” principals in the arena of school management because, “the IDSO is a senior in a position of knowledge.” This concurred with PR4’s opinion:

“I don’t want training sessions on all the issues but let’s identify critical areas where we really need training as managers. I know you can say you can go to a university and train or go into *onderwysbestuur* (education management) and other management issues and things like that. But we need hands on training and it’s not necessary to include all. If I had it or I need training on a certain issue, let us identify via the district improvement plan or school improvement plan.”

The IDSO is perceived as an expert or a person with knowledge. PR5 articulated that the IDSO is:

“somebody who has more knowledge or not necessarily the knowledge, but who will make the effort to find out exactly how to deal with the problem; and who will come back to you as soon as possible and say listen this is how you do it.”

To PR3 it was imperative for the IDSO to be equipped with knowledge to develop schools:

“I think it’s important that a person that is coming to a Special School as IDSO must have the knowledge, the experience, and must come through the ranks of LSEN to be an expert and to help us.”

This notion of development is clarified by PR2 when she said:

“I think the IDSO’s function is to actually engage with me and assist and mentor me in areas where I’m not equipped.”

The responses of participants indicated that principals understood the developmental role of the IDSO as being an expert in a position of knowledge.

#### **4.3.1.3 Being the leader**

Interviewees shared the opinion that sound leadership and management at the school combine to ensure quality teaching and learning. The leadership role of the IDSO was considered by PR5 as being:

“vitaly important, because an IDSO is in a leadership role.”

He viewed this as a critical area for both the principal and IDSO:

“leadership is the main function and that’s where principals fall flat... and the IDSO can also fall flat.”

PR2 concurred. Her opinion is that the IDSO is an:

“immediate superior, their main function would then be to ensure leadership.”

PR1 had a different opinion on the leadership role of the IDSO. As far as he was concerned the IDSO:

“should be your boss, but a friend and mentor at the same time”. He is convinced that the leadership role fulfilled by the IDSO should not entail “being the big boss.”

The participants’ understanding of the leadership role of the IDSO did not focus on a particular style or position, but was rather a confirmation that the IDSO was considered to be a leader.

#### **4.3.1.4 Managing curriculum**

The majority of participants claimed that the IDSO’s role entailed experience and expertise in curriculum management. PR3 frankly said:

“my understanding for an IDSO is to know special programmes which are running in a special school, also the power of extracurricular programmes that we use in schools.”

PR4 supported this perception:

“I’m not looking for you to do extra work or try to give you a job description. But for you as a person who is more regularly in contact with Curriculum, with HR (Human Resource unit), HRA (Human Resource Administration) and things like that. You, the IDSO must keep us informed of new things that are happening at district level and by bringing us up to date, it will be much easier for us to manage curriculum.”

PR6’s understanding of the IDSO’s role in managing curriculum extended to other areas that impacted directly on curriculum delivery. She said:

“the IDSO must monitor the schools regularly; because in the monitoring they then need to advise us as to whether we are moving forward, if we are correct or not correct. Monitor the LTSM (Learning and Teaching Support Material), you know, see to it that the funds are used properly for the purchase of the LTSM material. He or she should be able to promote and foster a culture of effective teaching and learning.”

PR2 had a different outlook on curriculum management. She said:

“I see my main function in insuring that effective teaching and learning takes place. So obviously ... the IDSO, as my immediate superior, their main function would then be to ensure leadership.”

Participants understood the IDSO’s role as being the overseer of curriculum management processes in the school, as well as having a broad knowledge of the various curriculum programmes offered at specific schools.

#### **4.3.1.5 An open relationship where we trust each other**

The relationship between the IDSO and the principal was emphasised by all interviewees. Words and phrases that repeatedly occurred during the interviews were: ‘trust, transparency, and openness’. PR3 said:

“the trusting relationship. I think it’s very important for an IDSO; the same trust that there must be between the principal and the deputy principal must exist between the IDSO as well as the principal.” PR3 further added: “Transparency

that we can open up with our IDSO.” This was confirmed by PR6: “I regard the IDSO as my partner. You know someone who supports me, someone I’ll speak to whenever I’ve got problems someone who I depend on.”

Another participant, PR4, was of the opinion that informal discussions and meetings between principals and the IDSO are important for improved human relationships:

“it is a good thing if we get together with our IDSOs, not just always formal but on an informal way, just to discuss in general and not always talk school. I think that is also one of the things that we need on a more social level if you can just relax and compare, or exchange a few thoughts.”

PR4 qualified his understanding of the IDSO’s role when saying:

“it’s not necessary to be friends and you come and visit at my place and I visit every Sunday at your place or whatever, but an open working relationship where we trust each other and we know that there is support.”

Principals further thought of the IDSO as a person that protects schools as he or she is the link between the school and the district office. PR3 understood the role of the IDSO as:

“the soundboard... before something goes to the Director; I think this person must be the barrier in between for us. I think there must be a good relationship.”

To PR1 it was about: “getting advice and assisting the school and to foster good working relationships between district and school”.

One participant viewed the IDSO as someone who shows understanding and consideration. PR5 said:

“have compassion... because when I make a mistake, I don’t have a problem with someone to say to me *listen you made a mistake*. And when I make a mistake then I will have the... courage and ...the trust that you will understand why I made the mistake.”

PR3 brought another dimension to this relationship. She was of the opinion that it is essential for the IDSO to have knowledge on matters related to human relations in order to deal with challenges at schools and :

“not to always, refer the problems that we experience in a school in HR (human relations) to the HR department at district office.”

PR3 thought that the IDSO must be able to handle matters related to labour relations:

“not always referring it to Labour unit, but to have experience to guide us with advice.”

There was a general understanding that there should be good working relationship, based on trust between the IDSO and the principal.

#### **4.3.1.6 Pick up the phone**

Most principals viewed good communication to be an inherent skill for the IDSO to exhibit as part of their role or function. PR3 said:

“I think if you can pick up the phone just to ask if you are available. I know your busy but understand as principal; I also need support from a person who’s an expert in education.”

PR4 shared PR3’s viewpoint:

“I don’t want unnecessary meetings... but if I need my IDSO, when I have to deal with a difficult parent. Then I must be able to pick up the phone.” He added: “I don’t want to phone you morning, noon and night... but when there’s a crisis, I want to be able to pick up the phone and speak to you. But I don’t want to speak to you only when there is a crisis...”

Having access to the IDSO should not be viewed as dependency but rather a reliable way for both the principal and the IDSO to communicate. PR5 assertively said:

“I don’t want my IDSO every single day on my back. When I have a problem, then I can phone him.”

Participants also mentioned the importance of IDSOs being good listeners. For example PR5 said:

“the most important thing for a principal is, in this role... is for the IDSO to listen. When I have a problem and I don't have a solution.”

PR1 understood the IDSO's role to:

“liaise with the principal, the SMT with regards to policy work, changes and general governance in the school.”

And although he understands that the IDSO interacts mostly with the principal, he was of the opinion that:

“it should be taken one step further. They should work with the SMT of the school as well.”

In agreement, PR4 said:

“it is necessary for the IDSO to liaise between the principal and the district. Not just the principal but if there are any other problems or questions that staff has.”

He also viewed information sharing between the IDSO and the principal as being instrumental to improvement:

“from your side as IDSO to help us and inform us as principals or managers, deputy principals even the HODs, to inform us what we can do to make our schools successful.”

Apart from networking and the sharing of information, principals referred to a communication model where feedback is an essential component for the interaction between the IDSO and the principal. PR2 felt that:

“it is the IDSO's function to come back to me with that report and sit with me and then I'll be able to explain why I've written certain things in that report...”

The patterns of belief that stood out in the first section of the interviews conducted with principals indicated that they understood the role of the IDSO to include areas of

support, development, leadership, curriculum management, human relationships and communication. In the absence of a job description for the IDSO, all participants surmised what they think the IDSO should be doing. One participant PR1 viewed his understanding of the IDSO's role by saying:

“GDE should actually send us a job description of an IDSO... at the moment, my expectation or my perception is what I have gained over the years. I have never been told you can go to this IDSO for this, this and this. So what I understand your role to be is what I have picked up over the years, and what I would imagine it to be.”

Next I look at how principals experience the current role of the IDSO.

### **4.3.2 Principals experience of the IDSO's role in schools**

In response to the question: *What is your experience of the current role that the IDSO is fulfilling at your school?* the data obtained from interviews revealed that the IDSOs' roles varied amongst the six research sites. Some interviewees reflected on positive contributions made by the IDSOs. The data, however, revealed mostly destructive experiences. One other aspect worth mentioning is the fact that interviewees referred to more than one IDSO in response to the question. This is because all six principals have had between three and five IDSO's during their careers as principals at their current schools.

#### **4.3.2.1 A supporting experience**

All the principals referred to the support rendered by the IDSO to ensure functionality of schools by strengthening the principals in areas of curriculum management, school management, human resource management governance and even leadership.

PR6 reflected that the support offered by her current IDSO positively contributes to school improvement. She said:

“my experience is that I see my IDSO as a partner at all times and I have had an experience, in that she is very keen to see to the curriculum delivery of the school improve and to promote quality education in my school. And I know that she is supportive at all times.”

PR6 also said that the support offered by the IDSO is extended to other structures within the school community:

“the IDSO have met with the SMT just to find out how the school is doing; also meeting with the parents...and the RCL.”

Another participant, PR2, also reflected positively about her first IDSO:

“she assisted me greatly in trying to understand where the school was and I must say that I appreciated her... she obviously, she had a lot of experience. She had a broad knowledge on how the school should function and she was willing to share that with me.”

Similarly, PR1 reflects that the first IDSO “would pop-in and have a cup of coffee and say *G how’s things going? What can I do?* That I respected.”

PR5 maintained that visits from the IDSO have supported him:

“because I feel the majority of the IDSOs do have the experience to advice principals and give them guidance and lead them in certain way.”

PR3 shared her experience of support offered by the IDSO that extended to all stakeholders of the school. She said:

“there was no criticising, there was support. When that person entered the office I could feel the support” later she adds “he was supporting in the appointment of people ... he sat in as a resource person to guide us to guide the SGB... And then he also supported in a very sad case when one of our learners passed away. He was there for us twenty four hours. He would phone me at night to ask, *Are you alright?*”

Later during the interview, PR3 displayed her disappointment with the current IDSO. She seemed sceptical about the situation:

“the current IDSO I haven’t even met, so I don’t know him. We haven’t even met in a circuit meeting. I saw him for the first time at a function where other people informed me that this was the new IDSO! I don’t know what support he

will provide, I don't know what kind of person he is, I don't know if he's got LSEN experience.”

The level of support offered to principals and schools speaks for itself. On the one end of the scale principals who experienced support reflected positively on the role of the IDSO, whilst those who were not supported were sceptical about the IDSO's role.

#### **4.3.2.2 Professional development**

The participants also emphasised the importance of development programmes for themselves, members of the SMT and educators. PR1:

“my first IDSO and the one that I have now, they were good IDSOs...they had good ideas. And it is nice to have somebody that can come in and explain some things to me, that practical knowledge...not the theoretical knowledge...the practical knowledge and applying it in the school. That is what I gained more than anything else.”

To PR6 it was the mentoring role of the IDSO that assisted her to develop as a principal:

“keeping abreast of all educational trends and developments and processes and reminding the leadership about our professional obligation towards education; and also mentoring and guiding me all the time.”

In contrast, PR5, was convinced that the Education Department, the IDSOs in particular fail to provide schools with training opportunities. He observed:

“the other thing I feel very strongly about is that there is a lack of training not only from the IDSO side, but from the side of the Education Department. The employer is supposed to give training to management, but the SMT do not receive training. It doesn't matter which level of management in order for us to develop. Currently it's an issue that the school need to develop the teachers, they need to develop the SMT, and the school need to develop the deputies and the principal in order for them to get some training. The IDSO again has expertise in certain field to provide training but that training will be limited; and

that is not really what I want but you are an expert in a certain field, this is what you can offer.”

Most school principals viewed the development offered by the IDSO and the district office as lacking and therefore arranged their own internal development programmes. PR6 said:

“we were able to organise two trainings for the teachers. I think one was from Life College, to the whole staff ...on leadership. And the other one was based on “branding”. And then we managed to get training from SchoolNet, whereby the whole staff was able to be taken through integration of subjects through computer programmes, you know, preparing etcetera... in curriculum related issues and SchoolNet was very helpful in training.”

PR2 also relied on internal developmental strategies:

“every term we have staff development and I think I’m very strong on staff development... And we if we can outsource it... for example we had a workshop on assessment and ... last year we did time management ... through SIP comes the development, the staff development. So I make use of the expertise of my staff.”

PR1 stated that they also outsource their development training:

“we find the resources and people to do it for us. I do not know how other schools do it...and if a school does not have the resources ...I don’t know how they would do it. We are very fortunate, we have the resources and fortunately we’ve got the expertise on the staff as well.”

He was convinced that the IDSOs are unable to provide developmental training:

“but schools that don’t have it...it’s never going to happen...never. Because the district cannot give it to us.”

The experiences shared by participants indicated a need for development from IDSOs but the majority of principals adopted internal development strategies.

#### **4.3.2.3 A leader relationship**

Interviewees shared experiences of autocratic leadership styles being practiced by some IDSOs, which resembles, as they put it, 'the inspectorate'.

PR1 referred to an incident where the appointed IDSO (IDSO number three) requested to speak to staff members:

“and he did speak to staff. And my staff became terrified when he walked through the gates because of his autocratic, dictator leader style. And it may have worked for some schools, but in our school we don't have an autocratic leadership.”

PR1 added that an autocratic style does not benefit anyone:

“I think we get IDSO today and as I said to you, I chat to some of my colleagues in other districts. It reminds me of the old TED days (Transvaal Education Department) where we had those inspectors that struck the fear of the living God into you the moment they walked into the school. And you know when you were told that there is an inspection coming, you would prepare for weeks beforehand. And those days are gone! You can't afford to operate like that...not in today's society... no you can't!”

PR1 continued: “some of the IDSO's are so... autocratic it's scary... so that you actually don't want them in your school. And that is the saddest point of all. It mustn't be like that.”

Three of the principals reported on a positive leadership relationship that existed between the IDSOs and themselves. PR6's experience of the leadership role of the IDSO revealed inclusivity:

“inclusiveness. People should not be hearing about an IDSO out there and maybe regard them as some kind of an Inspector or someone who is there to look for faults at all times; but they should see the IDSO as being part of the school and seeing what is taking place at the school.”

PR2 shared PR6's experience of all-encompassing leadership:

"Mrs X also attended SGB meetings and SMT meetings to come and sit in and I must say that...there was nothing authoritative about her and nothing threatening. She didn't make you or make me feel that she was constantly coming to check on me and to monitor and evaluate, and yet that was what she was doing. But her approach was very informal and very casual."

PR6 echoed what PR2 said. In her understanding the IDSO is more than a person in a leadership position. "I regard the IDSO as my partner. You know someone who supports me, someone I'll speak to whenever I've got problems, someone who I depend on."

PR3 reflected positively on the visionary leadership offered by the first IDSO of her school:

"he had a vision, to see principals being empowered... to function in the school. As a newly appointed principal he enrolled me for the ACE course, and let me tell you ACE is one of the best courses you can follow as a principal in management, in labour, in policy and in managing the school; understanding people. And that was my experience with the previous IDSO."

The participants experience the leadership style administered by the IDSO to have a distinct influence on the relationship between the IDSO and principal. Positive experiences were shared by participants where the IDSO had democratic, visionary leadership styles. On the other hand autocratic leadership styles had a demoralising influence on principals.

#### **4.3.2.4 There are ways to work with people**

These principals also believed that creating a good working atmosphere where people feel good about themselves and their work can enable the IDSOs to command respect from others and promote a culture of trust at the school to enhance good relationships.

PR1 referred to the first IDSO he had and the role played by this IDSO as a very positive experience:

“she was my mentor. She stood by me through thick and thin, she was my friend on a school level.” He added: “if I wanted to be an IDSO that would have been my role model! No question about it. But as I say boss, mentor, friend. Yes. Not a big drinking friend. But somebody that was there if I had a problem, I could pour my heart and soul out.”

PR2 also reported to having good rapport with the IDSO:

“one of the things I appreciated about her was the way in which she kept our cluster together. We had regular, meaningful cluster meetings. In a way, number one with networking where... within the meeting you felt, because she was that calm person but also very open, she allowed us to be open in the meetings and I got to know principals in a very personal way; that, I just think is something that comes from the fact that the cluster meetings through Mrs X were constantly held and you felt that freedom.”

PR6 stated that during her years as principal she experienced “acknowledgement” from the IDSO:

“my being here at the school for all the years has been appreciated. I’ve been valued and that keeps us motivated. It keeps us to think that there is someone out there who appreciates what we do and in that way I think that a school can be able to move forward.”

PR1 referred to the good relationship that existed with the first IDSO. His experience included members of his staff:

“I didn’t have hesitancy when she would walk in here to say to her come in and have a cup of coffee...My staff knew she would come through to talk to the staff. She would say *hello*, every now and then she would come through and request to see the staff during break. And she would just chat to the staff to see how things were going. A massive loss.”

Principals also revealed experiences where their interaction with IDSOs had been humiliating as far as relationship building is concerned. PR1 revealed the following:

“the one IDSO that I had, I felt that it more of punitive action taken against the school all the time, we were constantly told *what about this, what about this, what about that?*” *“When are you doing this, when are you doing that? It was done! It has always been done! You don’t have to check up on me all of the time. Maybe it was not intended, but we felt we were constantly being picked on.”*

Later during the interview PR1 shared another negative experience:

“that particular IDSO would ‘pop-in’ now and again, but always arrive with an arrogant attitude. That arrogant attitude sort of settled towards the end, just before he left us. But I never had a good working relationship with that person; he was always trying to prove a point. I did what I was instructed to do, but I never felt that I’m going to make an extra special effort.”

Principals described how the district office often demands submission of documents and how because of changes enforced by the head office, submission dates change. Their objection was not aimed so much at the haphazard changes being enforced as at the approach followed by officials when communicating changes to schools.

PR1 shared his experience of such a conversation:

“then the IDSO says *I don’t know what the story is but if the department says you will have it done by such and such a date do it!* Where others would have come back to me and say *listen G...the problem is...that head office has given it to us now, it is very late, they are putting pressure on us, please won’t you just help us out.* Different story altogether. But don’t tell me I must do it! There are ways to work with people.”

PR5 made it clear that if the purpose of requested data could be explained to schools, it could assist:

“to us it seems that this one would like to have this without giving us a run-down, a brief to say what must be included. Why do you need it? So that we

can have the same understanding on what the expectations, and the purpose of the request is. We at grass root level making decisions, they have unrealistic expectations and we cannot execute those expectation, because it just doesn't make sense."

The experiences shared by participants focus mainly on their need for solid, positive human interaction with the IDSOs.

#### **4.3.2.5 Communication skills**

The principals believe communication is an important characteristic for effective leadership. PR6 claimed that regular interaction with the IDSO has benefited the school:

"she communicates with us regularly through memos or cluster meetings or through visits, just to come and find out *how are you doing?*. And in this way we are able to share information and also in a way the IDSO can see how the school is running and this stimulates the management or the leadership to be better equipped at all times; and probably to promote a work ethic."

PR6 experienced the current IDSO's communication strategies as being practical:

"look to me it is valuable. We are living in times of technology and sometimes you might forget reading the memo on the table or the memo delivery might be late. So if the IDSO takes the time to get the message to you by means of sms or e-mail, I find that very helpful."

PR5 also responded positively about the communication that exists between him and the IDSO:

"the visit is not really an issue in my life because I know that when I have a problem I can pick up the phone and phone my IDSO and say "mam this is my problem, what do you advise?" and I will get an answer. When she's not available I will get an answer during the course of that day."

He added:

“I personally don’t feel that the IDSO needs to make an appointment to see me. If the IDSO is in the area or vicinity that he or she must feel welcome...or feel they can ‘pop’ in, just to find out how are the school doing, is there any problems, is there anything that I can assist you with?”

PR5 also reflected on his interaction with past IDSOs, who extended their contact to the SMT and educators of the school. He explained:

“we normally invite our IDSO once a year to a SMT meeting. Normally in the beginning of the year, to share with us what the vision of the district is. Where would the district like to go? So that we get the idea, so that we can incorporate it into our action plans in order to get certain goals and certain things across. So that everybody is aware of it and then also the important thing is that we invite the IDSO once a year especially in the beginning of the year to introduce her to all the staff.”

He added:



“I think the most important thing is that we should have that interaction one a year if there are issues they can address it with the IDSO ... they have the freedom to speak to the IDSO. So that the IDSO can play the role of a mediator should there be a need for it.”

PR4 also shared similar experiences and stressed the importance of interaction between the IDSO and other stakeholders:

“our previous IDSO had meetings with the SMT but current there has been no such interaction. When you speak about the IDSO, they know it is ‘Mr X or Mrs X’, who will be coming to the visit the school. But not really any interaction where he or she will meet the staff or even to introduce the IDSO to the staff to say ladies and gentlemen, this is our IDSO. And I think it is important for staff members, even the most junior person, to know I can talk via the principal to the IDSO. I believe that people should be informed of what is happening at the school.”

All participants viewed the flow of information from the IDSO to principals and even to other stakeholders as a way to improve effectiveness at schools but more importantly to uplifting morale of people.

#### **4.3.2.6 Discontinuity in the IDSO unit**

It would seem that the instability created at district level by replacing IDSOs and reshuffling circuits and clusters of schools was a cause for concern. Most of the principals disapproved of this as these changes occurred without consultation. Three of the principals also noted that the “nonexistence” of the “new” IDSO was disappointing.

PR1 had had four different IDSOs in his seven years of being a principal. He shared his experience:

“one, the lady that I originally had was promoted. Then I was seconded to another IDSO, ‘chalk and cheese’. Then I was once again seconded to another. Then that gentleman left, he took a job in another town and I was seconded to another lady. I never saw the lady once...never saw her once. And then all of a sudden the circuits were ‘rubber crumbled’; my original circuit was then split up and I was then given to my new IDSO...”

Disheartened, he added: “just as we get used to someone, then they’re gone again. Maybe that is the reason why we don’t get support from Curriculum, from HR (Human Resource unit) and other units.”

PR3 shared a similar experience:

“since 2007 I had one (IDSO) in my time of as acting as principal...then I got another one for a year; that I actually will say is an idol for a model as an IDSO. Then I got an acting one and still has another an acting one; that I haven’t met as yet; not even introduced by telephone or anything.”

PR5 evaluated the experience that he had had with his three different IDSOs as follows:

“if I have to compare the IDSOs from the three IDSOs, two I can give full marks on leadership, management and governance and the other one...the

other IDSO my personal view: she didn't lead me, she didn't manage me, and she didn't give guidance to the school.”

PR6's opinion on changes made to circuits or clusters by the district office was indifferent:

“sometimes you have this bonding relationship and then suddenly there's a discontinuity and yet on the other hand it's always nice to meet other people also. One should not be afraid. Because one IDSO might be able to deal with some issues and the other one might not.”

The experiences shared by participants show that they were equally exposed to both positive and negative situations. Salient themes derived from the interviews pointed to areas of support, development, leadership, human relationships and communication as being important to them. It is the effect of continuous changes made by the district office to clusters or circuits without consultation that stands out as a demoralising factor.

Next I look at the expectations that principals have for the role of the IDSO.

### **4.3.3 Preferences for future interaction with the IDSO**

The third question posed to the participants was: *what role should the IDSO play to support the school?* This question allowed participants the opportunity to share their views on how they would like to be supported by the IDSO. The data derived from the interviews was, once again, integrated into themes that emerged from the responses obtained.

#### **4.3.3.1 Transforming schools into learning organisations**

All the respondents were in agreement that the leadership role of the IDSO requires improvement. The principals recommended strategies for the IDSO to support schools in accordance of their needs.

PR5 stated that principals are interested in knowing what the IDSO's goals are for the circuit or cluster they belong to:

“as a leader it is to tell us where are we going, the vision, this is where we are going, this is what we want to achieve, this is our goals for this year. This is what I as an IDSO with my circuit would like you to achieve. If we get that right then immediately those goals can be implemented at the school to the SMT, from SMT to the educators.”

PR6 considered leadership support as a critical area for success:

“I think it is important for the IDSO to ensure that leadership at the school and obviously the development of leadership leads to transforming schools into learning organisations; to increase the confidence and ethos of leadership in schools in a very supportive and realistic manner. Also to encourage the incorporation of her own experiences and sharing of her experiences. Help with turn-around strategies because there could be weaknesses. I mean you know nobody is perfect we all have our own weaknesses and if the IDSO is able to identify those weaknesses then she or he could help with the turnaround strategies to address those issues. You know I think that is very important for the IDSO to do and to advise the school and help with the techniques to achieve outcomes.”

Participants expect the IDSO to lead in an advisory capacity and in so doing to assist the principals to develop and improve their own leadership abilities, to achieve set goals.

#### **4.3.3.2 Developmental needs**

Three principals expressed a need for development on discipline. Two of them were of the opinion that the IDSO was the most suitable person to perform this role. PR3 said:

“I think the IDSOs have a major role to play, even in discipline. To talk to my learners at assembly and say to them *I'm the IDSO of your school and I'm supporting the principal and the staff in disciplinary matters.*”

PR4 expressed his need to clarify disciplinary procedures:

“if we could have the input from the IDSO, it’s not necessary to have the full training again. For instance, if the meeting could be about discipline, expulsion, suspension.”

Although PR5 articulated the need for development on learner discipline, he seemed sceptical about the IDSO’s capacity to deal with this matter:

“if I look at the support, I would say it will be on the side of discipline. That is where I would like to have more training or clarity on. If possible outsource the training to a law expert because... some officials in the district office do not have the expertise...Let’s talk about it, discuss issues. Let there be a discussion where we can make an input.”

PR6 prioritised leadership development as being a key area for a principal:

“other things can be taken care of, things like curriculum can have someone who specialises in curriculum and even the curriculum unit at district can assist, but the leadership style is very important. Therefore I think the IDSO should be able to engage with the principal and train or guide him or her in terms of what leadership style he or she is going to implement at school, I think that is very important.”

PR 2 is of opinion that the development offered by the IDSO can be in the form of a mentoring relationship.

“where I would struggle or have challenges in leadership and management, I would then see the IDSO as coming in to provide perhaps in terms of coaching me in the challenges that I have.”

Some interviewees requested specific development in critical areas. However, the general wish expressed by participants included coaching and mentoring as developmental strategies.

#### **4.3.3.3 You can't have trust with somebody that you don't have a relationship with**

Good human relationships was a prominent theme. The research participants perceived having good human relationships as one of the essential qualities of an IDSO. One participant, PR2, said:

“there has to be a special kind of relationship. A relationship of trust and a relationship of confidence. Who else does a principal turn to besides the IDSO? Who understands the school? And you can only have that kind of relationship if you have got time to invest in that particular school.”

She added: “trust comes through relationship. You can't have trust with somebody that you don't have a relationship with.”

PR1 confirmed this:

“to me the number one thing still is having a good working relationship. I think the IDSO should be the voice of the school, because in many ways you are the voice at district. You are my link to the GDE. And therefore we would request that you listen to what teachers and the SMT have to say. I think if that relationship exists then everything else will come together on its own.”

PR5 stated that the IDSO's positive attitude towards the school is vitally important to him as a principal:

“we want to have a good relationship with the district, to make sure that the district - doesn't matter which unit, do understand where the school is coming from. It's again how you approach the school. If you have an attitude...you are not going to get anywhere. If you are negative, you are not going to get anywhere. If you come with a positive attitude to make a difference in the life of the principal, the SMT, the teachers, and the school, you are going to have their support. That's the vital important thing to me.”

PR1's heartfelt expectation echoed what other participants stated:

"what I would like to see is an IDSO that I must respect as a person. Yet the person is not different to me, they are not above me, they just hold a different job to me."

Most respondents mentioned the expectation of good relationships between the IDSO and the school and some also expressed the wish to have improved relationships with the entire district office.

#### **4.3.3.4 Liaising for improved communication**

Most of the principals were convinced that improved communication strategies, such as regular interaction with principals, increased visibility of the IDSO in the staffroom as well as timeous feedback to schools, could improve the IDSO's role at schools.

PR5 expressed his expectation as follows:

"currently in our district we have once a term a meeting with the IDSO. I personally think this is a good thing. I believe that if we have monthly meetings to run through certain things, because then we start to iron out certain issues, problems, if we could have monthly meetings"

PR4 also expressed hope for regular interaction:

"if I and my IDSO can have contact on a regular basis, then the IDSO would know what is going on."

PR1 and PR3 were in accordance that the IDSO should have direct interaction with educators. PR3:

"I think visits, visibility with the staff coming to the staffroom talking to my teachers"

PR1:

"I would also say be more visible. Although the IDSO is a very busy person, when you do come for a visit, spend some hours at the school. The visibility is for staff to know who you are."

PR3 elaborated that he expects improved communication from other structures at district level.

“timeous return of documentation...timeous notification of meetings, dates and stuff. If we had that... then things will work. Not only timeous return of documentation, but also the correct documentation. If the IDSOs can improve on timeous return of documentation, correct documentation and timeous notification...then everything will function like a dream.”

A significant theme that kept recurring was the liaison role of the IDSO. Four principals expressed the opinion that the communication between the district office and schools can improve if the IDSO were to liaise with other units at the district office to improve service delivery at schools. One principal, PR4, reflected:

“I think information sharing, knowledge of what is going on at the district. Bringing specialised information to schools, after liaising with curriculum, HR, HRA and Labour units.”

In agreement PR1 noted:

“if the IDSO can be our link to the district then things will get better for all of us.”

To which PR3 added:

“it’s my responsibility to go to HR to submit recommendations for payment but the IDSO can play a major role in ensuring to make things happen faster.”

Another principal PR6 also noted that the liaison role of the IDSO could be the answer:

“I think the IDSO is a very important person to assist the school in liaising with other units at the district office. So that he or she can give assistance. Because sometimes we engage with people at the district office and we don’t get their cooperation. The only person you rely on is your IDSO I think he or she is the best person to rely on whenever things are not happening.”

The expectations of participants for the IDSO's liaison role are based on prospects for improved service delivery by all units within the district office.

#### **4.3.3.5 The IDSO must come through the ranks**

Four respondents commented on the appointment of the IDSO as a person in position of power. The expectation was that the IDSO should be appointed on merit, being a person with the necessary knowledge, skills and experience to do justice to the profession. PR3 had the following to say:

“the IDSO must have the knowledge, the experience, must come through the ranks...I expect from them to have experience in the different types of specialised schools that exist.”

PR1 added:

“I would hope that people that are being promoted to that post are capable of coming back to us and telling us how things should be done.”

However, the experiences shared by the participants paint a different picture. PR3 said that the challenge is not with the person that is appointed as an IDSO but rather in the manner that the appointment policy is applied:

“perhaps it's not the person ... I think it's because of lack of knowledge and I think affirmative action plays a role in the sense of people not going through the ranks. Because of this equity...knowledge falls apart along the way.”

In agreement with PR3, PR5 stated:

“I think that the IDSO's need to be appointed on merit and not on a political point of view. They represent the school; they don't represent an ideology or a certain way of thinking. They are there to serve the community or serve schools and not serve an affiliation or a particular political party.”

PR3's concluding remarks echoed the thoughts shared by other participants:

“positively the IDSO can play a major role in a school. Negatively we can cope without the IDSO, if things are going the current way. And if it's not a positive influence on me, if it's a stress factor on me, then I don't want an IDSO. I'll

rather get support from my lifeline that I've built throughout the time as principal.”

The lifeline that PR3 refers to was also mentioned by PR1. Participants referred to fellow principals in the circuits or clusters to which they belonged in the past. The lifeline also includes membership of affiliated bodies, to ensure sound governance. PR3 explained how her lifeline operates:

“we know each other, we work well together, we phone and we support one another by sending letters to each other to establish if all has received these memos or this notification.”

PR2 also made mention of this concept:

“we had regular, meaningful cluster meetings. In a way, number one with networking where I got to know principals and even today, those principals we phone each other.”

#### **4.4 SUMMARY**

In this chapter I presented the views, beliefs and ideas of six school principals which were shared during individual interviews. I used the data collected from the interviews to describe the participants' understanding and their current experiences of and expectations for the role of the IDSO. In organising the data from the interviews, I found four prominent themes based on the universal experience of principals. They are ideas of support and development, leadership, human relationships and communication and IDSO competency. I found no evidence in the data to differentiate between responses which relate to the principals' gender, the contexts of the principals' schools or the school phase (primary or secondary).

In the next chapter, I discuss the findings, make recommendations and conclude the study.

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## CHAPTER FIVE

### DATA INTERPRETATION AND RECOMMENDATIONS

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#### 5.1 INTRODUCTION

As stated in chapter one, the aim of this study was to describe school principals' understanding of the IDSO's role as well as their current experience of the role that IDSOs are playing in schools. The data obtained through individual interviews, provided me with a "framework in arriving at a deeper understanding" (Babbie, 2008:34) as to what their expectations of the IDSO's role in supporting schools is.

This chapter focuses on the findings from the interviews conducted in the JW district in Gauteng and is supported by the literature which provides a conceptual framework for this study. The findings are discussed in the light of the research questions:

- What is the participants' understanding of the IDSO's role?
- What is their experience of the current role of the IDSO?
- What role would participants wish the IDSO to fulfil in supporting schools?

This chapter encompasses the interpretation of the findings, recommendations, topics for further research and a conclusion.

An overview of the study will follow.

#### 5.2 INTERPRETATION OF FINDINGS

In the light of the literature review in chapter two and the data analysis in chapter four, the following important findings were made. These findings are interpreted in accordance with the aims of the study, namely:

- understanding the role of the IDSO;
- principals' experience of the IDSO role in schools; and
- expectations for future interaction with IDSOs.

##### 5.2.1 Understanding the role of the IDSO

In the absence of a job description for the IDSO, all participants surmise what they think the IDSO should be doing. Although their understanding of the IDSO's role was based predominantly on their own experiences and interaction with IDSOs, the

participants' commented on the importance of the IDSO's leadership role and the sharing of their expertise with schools to support and develop principals, SMT and educators in general. The responses made by principals showed that their understanding of the IDSO's role was primarily to support the principal and the SMT on an on-going basis. All six interviewees, however, had their own understanding of what the 'support' entailed, as well as the areas where 'support' was needed. To some, the focus for support was on policy compliance, others viewed support on disciplinary matters within a labour relation framework as being more important, and one principal's understanding of the IDSO's support was that it is to deal with 'difficult parents'.

Most principals recognised that the development offered by the IDSO to schools included domains of management and governance. Interviewees were of the opinion that the combination of sound leadership and management at schools ensured quality teaching and learning. They also viewed development and support as interrelated concepts that are applied to capacitate schools through mentoring in areas where the principals are not equipped.

The responses of participants also indicated that principals understood the developmental role of the IDSO from the perspective. Their responses reflected that they believe the IDSO to be the expert, a person with experience in curriculum management, and someone who has a broad knowledge of the various curriculum programmes offered at specific schools. One principal understood the IDSO's role in managing curriculum to be extended to other areas that directly impacted on curriculum delivery, such as the monitoring of LTSM (Learning and Teaching Support Material), the proper utilisation of the LTSM budget and being able to promote and foster a culture of effective teaching and learning in schools.

The relationship between the IDSO and the principal was emphasised by all interviewees. Words and phrases that repeatedly emerged during the interviews were: 'trust, transparency, and openness'. This also linked strongly to their view on communication between the IDSO and the school. Most principals viewed good communication to be an inherent skill for the IDSO to exhibit as part of the role they fulfilled.

The leadership role of the IDSO was considered as being 'vitaly important'. Participants viewed leadership as the main function of the IDSO. The participants' understanding of the leadership role of the IDSO did not focus on a particular style or position, but rather on the fact that the IDSO was considered to be a leader and an immediate superior.

### **5.2.2 Principals' experience of the IDSO's role in schools**

The data obtained from interviews revealed that the IDSOs' roles varied at the six research sites. Several interviewees reflected positively on the experiences they have had by stating that the IDSO is seen as a partner who is there to promote quality education through improved curriculum delivery strategies. One principal claimed that the IDSO "is supportive at all times".

All the principals referred to the support rendered by the IDSO to ensure functionality of schools, to strengthen the principal in areas of curriculum management, school management, human resource management governance and even leadership. It is the level of support offered to principals and schools that showed a discrepancy. At the one end of the scale principals who had experienced support from their IDSOs reflected positively on the role of the IDSO, whilst those who were not supported were sceptical about the IDSOs' role and their abilities.

The experiences shared by participants indicated a need for professional development offered to the SMT and educators. However, most school principals viewed the development offered by the IDSO and the district office as lacking and therefore they outsourced development programmes or they adopted internal development strategies. In general, the picture that emerged in relation to their current experience of the IDSOs' can be described as being non-satisfactory. This aspect is also reflected in the literature by McKinney (2009:2) who states that recent assessments of the local schooling system point to districts being perceived as not to be fulfilling their potential as arenas of crucial support to schools.

### **5.2.3 Expectations for future interaction with IDSOs**

My findings present a varied picture of expectations from principals for the role of the IDSO. A predominant expectation for leadership emerged from the data. Interviewees expressed a need for visionary leaders. Participants also expect the

IDSO to lead in an advisory capacity and in so doing to assist the principals to develop and improve their own leadership abilities, to achieve set goals in their schools.

Another expectation was the need for improved communication. Principals were convinced that enhanced communication strategies such as regular interaction with principals, increased visibility of the IDSO in the staffroom, as well as interaction with educators, could improve the IDSO's role at schools. Apart from expecting good relationships between the IDSO and the school, several interviewees also expressed the wish to have improved relationships with the entire district office.

To some extent my respondents also portrayed traces of hope in their understanding of the IDSO's role by viewing the IDSO as a person that can support the principal and empower him or her through the sharing of knowledge. They think it is important for the IDSO to ensure the development of leadership that would lead to the 'transformation of schools into learning organisations'. Ferguson, et al. (2000:92) reported that the majority of school heads in Great Britain responded positively towards an inspection process that would make provision for inspection teams to provide assistance and advice to schools. They expressed the belief that an advisory role for inspectors would most definitely constitute a major improvement in school management (2000:93).

The majority of principals expressed the desire that IDSOs to be appointed on merit and to be a person with the necessary knowledge, skills and experience to do justice to the profession, and that 'the IDSO must come through the ranks'. This preference is also reflected in the literature. According to Behr and Macmillan (1971:71) the school inspector had to possess a comprehensive and successful background as a principal, and be a man of culture and expansive sympathies who was able to work with teachers and appreciate that each school had its own nature and individuality.

### **5.3 RECOMMENDATIONS**

The aim of this research was to achieve a clearer understanding from school principals in the JW District as to how they consider that IDSOs can offer the best support. This study, though only a small-scale study, showed that principals' expectations for the role of the IDSO include the areas of support and development,

leadership, human relationships and communication. In addition to the aforementioned expectations principals expect the IDSO to be competent. The findings of this research are incorporated in the following recommendations:

### **5.3.1 Support and Development**

Development programmes for principals, SMTs and educators should be reviewed. Even though Chinsamy (2002:8) deems the district office to be pivotal to successful school improvement, other readings within the literature identify the 'district' as a neglected layer in the education hierarchy in terms of "setting the policy direction and building the capacity required for playing its appropriate role in improving the quality of schooling" (Taylor et al., 2003:127). Most school principals viewed the development offered by the IDSO and district office as lacking and therefore it is recommended that appropriate training be provided in line with a school's needs and in accordance with a school's improvement plan.

### **5.3.2 Leadership**

IDSOs are responsible for the overall functionality of schools and perceive themselves as managers of principals and schools (Narsee, 2006:120). The IDSO's role is vital in maintaining high levels of school leadership and management, thus creating a supportive environment in which quality educational programmes are provided.

I recommend that management consultants be appointed in various areas and units within the district office. These consultants will be expected to fulfil a critical role in advising the district director, the district management team (DMT) and in particular the IDSO regarding the most effective leadership styles to be used.

### **5.3.3 Human relationships and communication**

IDSOs should create open channels of communication with schools as well as within units at the district office to ensure the improvement of service delivery to schools. It is recommended that IDSOs utilise practical communication strategies by means of technology such as cellular phones, e-mail and fax to remain in contact with schools and to avoid a breakdown in communication between school and district.

I further recommend that the IDSO should ensure that regular, meaningful meetings with principals are implemented for purposes of information sharing, networking and building relationships at a professional level. A prominent theme that kept recurring was the liaison role of the IDSO between the district and schools.

I also recommend workshops for all staff at the district office to develop and improve their communication skills in order to enhance good interpersonal relationships. Muller and Vinjevoold (2003:15) claim that districts are in close proximity to schools and can potentially influence school development through effective communication.

#### **5.3.4 Competency of the IDSO**

One of the most important factors influencing school effectiveness is the nature and quality of the leadership and management provided by the IDSO.

I recommend that the criteria for the appointment of individuals in the position of IDSO should be reviewed and the criteria for appointments should include relevant qualifications, experience, job knowledge and people skills. In chapter four one interviewee, PR3, states:

“the IDSO must have the knowledge, the experience, must come through the ranks. I expect from them to have experience in the different types of specialised schools that exist.”

The demands for greater accountability, changing demographics, competing community needs, limited resources, politics, legal challenges, shortages of qualified teachers and principals, and a general lack of respect for the education profession has made the IDSO’s position vulnerable (Usdan et al., 2001:26). Considering these often restraining circumstances the need for informed and committed district leaders, who can propel school systems toward high levels of performance for all students, is greater than ever (IEL, 2001:26).

#### **5.4 TOPICS FOR FUTURE RESEARCH**

In this study I endeavoured to understand what principals expect from the IDSO. Support and development from sub-units at the district office were not dealt with. This could be a topic for future research with a particular emphasis on human

resource management and development (HRM&D) and curriculum management (CDS) units.

In order to advance our understanding of the role of the IDSO, this study raises some questions that could be answered by further research. Firstly, as previously stated, the data for this study was gathered by interviewing six principals relating to their expectations. An alternative approach would have been to invite the IDSOs to express their understanding of their roles at schools and what is expected of them to assist schools. This could help IDSOs focus on their role with regard to school improvement and to determine specific needs that they need to develop.

Secondly, it would be of value to establish whether other units at the district office that interact with schools are aware of their role and function in supporting schools in accordance with the needs expressed by principals. For example, professional development programmes for principals, labour relations, service delivery by HRA and, most significantly, support offered by CDS in curriculum development programmes that should be provided to schools to ensure improved learner achievement, are possible areas for future research.

Another potential area for research is the influence of re-alignment within districts in Gauteng regarding school improvement. In the near future schools will be clustered according to geographical areas and sub-units within the district will then offer support to schools as teams of experts. It would be of interest to study the effect of team support and the practicality of developing teams to service all schools in line with the proposed post establishment for Districts.

## **5.5 CONCLUSION**

In this chapter, I summarised the findings of the research concerning the expectations that principals have for the role of the IDSO. It is evident that principals had varied perceptions of what they think the IDSO is required to do. The participants were adamant about the specific improvement they wanted to see in leadership development, communication strategies and improved human relationships between the IDSO, the entire district office and the school. The IDSOs' inability to offer a supporting role should be viewed against the background of the absence of a job description for the IDSO. Smith (2011:120) postulates that the

ambiguity surrounding the IDSO's professional identity is related to the absence of any clear sense of their role.

The role of the IDSO is furthermore perceived to be vital in maintaining high levels of school leadership and management, thus creating a supportive environment in which quality educational programmes can be provided. The existence of supportive relationships between schools and their IDSOs was also discussed in this chapter. The IDSO is more than a person in a leadership position. PR1 indicated that he regards the IDSO as his partner: "someone who supports me, someone I'll speak to whenever I've got problems, someone who I depend on."

Whilst there seems to be consensus that districts can only successfully impact on school reform if the improvement of teaching and learning at the classroom and school level is central to their work, there is little evidence of this kind of focus in the current role and functioning of districts in South Africa (McKinney, 2009:3). The responsibility for developing and supporting school principals to achieve national and provincial mandates, aimed at providing quality education, does not only rest with the IDSOs'. Education administrators, school managers, teachers, district officials and IDSOs all need to make a concerted effort to transform the education system in South Africa.

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## APPENDIX A



## PERMISSION LETTER



Rethink Education. Reinvent Yourself.

05 December 2010

The Principal

Dear Mrs X

### **Permission to conduct research**

Mrs Satie Raath (student number 200520291) is engaged in research for her Masters degree in Education Leadership and Management. The focus of Mrs Raath's research is the Principals' experiences and expectations of the role of the Institutional Development and Support Official in supporting Gauteng schools. She is particularly interested in how the IDSO can best support the school principal and how the IDSO's role is currently perceived by school principals.

The purpose of this letter is to inform you of her research interest and to ask for your participation in the study. Mrs Raath will contact you to request an interview as well as access to school documents relevant to her study.

This project carries my full blessing and I believe it is likely to produce findings that will be of value to academics and professionals in the field. It is particularly important for her to glean the perceptions of an experienced principal such as yourself. I therefore request that you "open doors" for her by participating in the interview and by making available copies of documents that can assist her in this study.

Her research will be conducted in strict confidentiality and all research participants will remain anonymous. Her findings will be made available to you.

Thank you for your anticipated participation. Please feel free to approach me should you have any questions.

Sincerely

Dr Clive Smith  
(Supervisor)  
[csmith@uj.ac.za](mailto:csmith@uj.ac.za)

**APPENDIX B**



**CONSENT FORM:**

I, \_\_\_\_\_, hereby agree to take part in the research project on **“Principals’ experiences and expectations of the role of the Institutional Development and Support Official in supporting schools”**.

I understand that I will have to be available for one interview session (by appointment) and that the interviews will be recorded by means of an electronic recording device.

I understand that:

- I will not be asked personal questions and may at any time decide not to answer questions if I so wish;
- I may ask for access to the dissertation or part thereof; and
- My identity shall stay anonymous in this study.



UNIVERSITY  
OF  
JOHANNESBURG

\_\_\_\_\_  
**(PRINCIPAL)**

\_\_\_\_\_  
**E.L. Raath (RESEARCHER)**

**Date:** \_\_\_\_\_

**APPENDIX C**



## A QUESTIONNAIRE ON BIOGRAPHICAL DATA

### PROMPT CARDS

This research project is aimed at gaining a clearer understanding from school principals in the Johannesburg West District as to how they think the IDSO can best support them.

### Instructions

- Please **do not** write your name on this paper.
- Please answer every question.
- You are kindly requested to complete the questionnaire on your own and in private.
- All information collected will be used strictly for the purpose of this study and will not be disclosed for any other purpose.

### BIOGRAPHICAL DATA



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Gender: \_\_\_\_\_

Age: \_\_\_\_\_

Highest professional qualification: \_\_\_\_\_

Post Level: \_\_\_\_\_

Years of experience in education: \_\_\_\_\_

Years of experience in position of principal: \_\_\_\_\_

Type of school where you are appointed as principal: (✓ the appropriate block)

PRIMARY SCHOOL	SECONDARY SCHOOL	SPECIAL SCHOOL
----------------	------------------	----------------

**THANK YOU FOR YOUR PARTICIPATION**



## **INTERVIEW PROTOCOL**

DATE: \_\_\_\_\_ PLACE: \_\_\_\_\_

INTERVIEWER: \_\_\_\_\_

INTERVIEWEE: \_\_\_\_\_

### **1. Instruction for the interviewer to follow**

*(To ensure that standard procedures are used throughout all interviews)*

#### **1.1 Thank you for availing yourself to be part of this research study.**

I would like to remind you that the full interview will be recorded by means of an electronic recording device. This will assist me to transcribe the responses as accurately as possible.

Once I have completed transcribing the interview, I will avail the transcription report to you, affording you an opportunity to verify data for validity purposes.

I will not ask any personal questions and you may at any time not answer questions if you so wish.

You will remain anonymous and the school's name will not be disclosed at any stage of this study.

### **2. An Ice breaker Question**

*(To establish what principals understand the role of the IDSO to be)*

#### **2.1 According to your point of view, what is the role or function of the IDSO in schools?**

### **3. Questions to establish how principals experience the current role of the IDSO in schools**

3.1 What role is the IDSO playing in providing you with support in terms of your responsibilities as a leader, a manager or in governance of the school?

3.2 When seeking help or advice, how readily are your needs met?

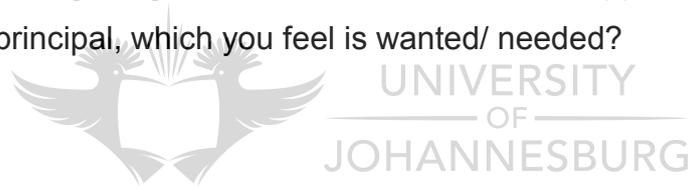
3.3 What were the most useful contributions made by the IDSO in assisting the school?

3.4 What are IDSOs doing that hamper your work as a principal?

3.5 What help/support are you getting from the IDSO that you find useful?

3.6 Are there aspects of IDSO intervention that you don't want, or do not see the need for such action?

3.7 What are you not getting from the IDSO in terms of support for the school and yourself as a principal, which you feel is wanted/ needed?



### **4. Questions to explore what role principals would like the IDSO to play in supporting schools.**

4.1 What do you think the IDSO's role should be in ensuring optimal support to schools and in particular to the principal?

4.2 In your opinion, which aspects of support from the District Office do you consider most critical to ensure success at the school?

4.3 What, in your opinion, would a newly appointed principal expect from his/her IDSO?

### **5. A final thank-you statement**

*(To acknowledge the time the interviewee spent during the interview)*

**APPENDIX E**



Interview conducted with – PR 3

Thursday 9 December 2010

Time: 11:30

**Interviewer:** My interest is in the role of the IDSO in schools and therefore my first question is to establish what principals understand the role of the IDSO to be. According to you what do you think is the role or the function of the IDSO in schools?

**Interviewee:** I think in the first place I wonder how many principals know what's the meaning of IDSO. The "support" word is the main thing for me (pause) knowledge, especially knowledge in a special school like our school, the LSEN school; to empower a principal by the knowledge sharing with a principal. I think it is important that an IDSO also have knowledge in HR, and do not always, refer the problems that we experience in a school in HR, to the HR department at District Office.

The Labour issues that we experience at school level, not always referring it always it to Labour unit, but to have experience to guide us with advice. A very (sigh) weak situation in LSEN schools is the curriculum orientation. I don't know if my current IDSO and also previous IDSOs exactly know what the type of school that we are, the type of learner that we cater for. I don't know if they know the holistic view that we have for every learner in a special school.

I don't know if they've got experience, and I expect from them to have experience in the different types of specialized schools that exist. The MMH, the disabled school like a school for severe mentally and then also specialized school who cater for remedial. The understanding for an IDSO to know special programmes which are running in a special school, also the power of extracurricular programmes that we use in schools. The time that we use to develop learners. Because they don't have the opportunities at primary or in ordinary high schools, so that they can actually achieve in a special school.

Sometimes (pause) we need the support, and not feel that we don't know what is right and what is wrong but rather that the IDSO guide you through in saying "this I think this is not a good idea or this is a better idea", and not to be criticised for what you are doing. Telephonic support, I think if you can pick up the phone just to ask

you are available? I know your busy but understand me as principal; I also need support from a person who's an expert in education. The trusting relationship. I think it's very important for an IDSO; the same trust that there must be between the principle and the deputy principal must exist between the IDSO as well as the principal.

Transparency that we can open up with our IDSO. Circular (pause) I think there's misunderstanding sometimes in the interpretation of some of the circulars between different IDSO's so there's no continuous program and progress that we can follow. (longer pause) There's a misunderstanding I think there must be a understanding for IDSO's in Special schools on retention and progression schedules and the way that learners progress in Special school. The disabilities that we cater for I think it's important that a person that are coming to a special school as IDSO must have the knowledge, the experience, must come through the ranks of LSEN to be an expert and to help us.

Staff training staff development I think will be a role from to be played by the IDSO unit. I can use an example here: say for instant General Assistant don't understand the number of hours that they are supposed to work. I want to phone my IDSO and say come and sit here and explain to this guy, perhaps in his language that there's a difference between an educator and a general assistant or a PS staff for that matter.

I think an IDSO should set an example and timeframes, use knowledge for internal issue. I think it's important for an IDSO to understand the resources in an LSEN school, (pause) for example why it is easy for one child to use scissors to kill another child for another pair of scissors. We are working with grinders in a welding centre. If you don't have the knowledge or the background of a Special school, you can't come here and sit here and deal with an issue on discipline, (pause) if you don't see the background of the school. So that is an important thing for me.

The soundboard (longer pause) before something goes to the director; I think this person must be the barrier (pause) in between for us. I think there must be a good relationship. I think staff support and when I'm talking about staff support I think it's important for the IDSO to come and sit , make an appointment to visit the welding centre, visit the building centre, sitting in the classroom to see what we're dealing

with and with that point of view they can go back to the District Office and say: “you know what this is going on in my LSEN school, this is how we deal with this , this is why I’m standing up for this case” (long pause) “the nature of this school that will be the recovery for this”.

**Interviewer:** How many years have you been in position of Principal?

**Interviewee:** Four years

**Interviewer:** Four years? And how long have you been Deputy Principal?

**Interviewee:** Nine years in Deputy and three years as HOD and, and in this school twenty two years or rather in a school like this with the specific nature.

**Interviewer:** In your years as a principal how many IDSO’s have you had at this school?

**Interviewee:** Okay since 2007 I had one in my time of as acting as principal... ..then I got another one for a year (pause) that I actually will say is an idol for a model as an IDSO. Then I got an acting one and still has another an acting one; that I haven’t met as yet; not even introduced by telephone or anything. So in my experience of IDSO’s I’ve got one person that I thought actually that was an idol, that was a person I could have phoned , that was a person that in a circuit meeting I felt comfortable enough to say to him: “you know what I’m sitting in this situation can you advise me?” With labour issues, policy issues... there was no criticizing, there was support. When that person entered the office I could feel the support, I could feel the ... how I can put it ...I could have feel the person came for the correct reason to my office in a supportive capacity. It wasn’t just to come and sit to criticise to say: “you know what this is what you did wrong; I told you to do this or this or this”. I didn’t feel afraid to be in this person’s presence. So, ja and that was only one person and I had. And that counts for my four years as principal as well as for the nine years of acting and being a deputy principal. Because then we also interacted with different IDSOs and I can say in thirteen years my experience with an IDSO... and in the view of my previous principal... there was only the one person that I was fortunate to work with him that was that person that I needed in my school.

**Interviewer:** You mentioned having four different IDSOs. Why the change? What happened? Can you elaborate a little bit more on why changes were made?

**Interviewee:** Okay unfortunately two of the IDSOs passed away ... then there was an acting one ... and I can say that I didn't have a good experience with the person. I support the District from the school's point of view. Sometimes when they phone me for a venue and stuff, I try to build on a positive relationship by saying "I'm giving with this hand and asking with the other hand". (Long pause) I didn't have a great experience. Then I had an IDSO with no knowledge of LSEN, not a bad person, she signed of my ACE and then suddenly went on study leave. Supportive, not interfering... but it was only for a short period and then I don't know what is the reason for shifting us around again (pause) we are only three school's left from the original circuit of schools and that's also a great concern. Because we know each other, we work well together, we phone and we support one another by sending letters to each other to establish if all has received these memos or this notification; and they stopped it because they moved us around and moving circuits around. So that's also a bad influence on the circuits and the good relation of working together.

**Interviewer:** This IDSO that you speak about that was very supportive and obviously showing good human relationship in terms of mentoring. Could you perhaps raise one or two incidents to illustrate the support given by this person?

**Interviewee:** The first instance was when my previous principal passed away and through the time that he went on sick leave and I needed support as the deputy. Because sometimes you should expect something to happen in future and he was very supportive. When I phoned him, I could say to him "you know I'm still a deputy I'm not too sure about how this or that" ... and he was supporting in the appointment of people... even in my own appointment he was involved in supporting my deputy principal in procedures for interviewing and then when I had to appoint a new deputy in my post I did phone him and I've said to him "you know what I'm not sure, I need support you must sit in on the interview panel" and although he was not a part of the panel, he sat in as a resource person to guide us to guide the SGB. To say to them you know what, this you can't do, this you're allowed to do, be aware of this and then the process went smooth, and we could appoint.

And then he also supported in a very sad case when one of our learners passed away. He was there for us twenty four hours. He would phone me at night to ask, "Are you alright? I'm visiting tomorrow. I want to see the scene where this happened; I want to know the details." Even when the newspaper walked in our office, when I looked up that afternoon he said to me "give my cell phone number to the newspaper or to the media, you are not there for that I will take it up myself". So in that case my reports, everything was sorted out and I think that was a huge thing to me!

**Interviewer:** That's fantastic. From the time that this IDSO has passed away, how are you dealing with crisis situations at school or where you need advice?

**Interviewee:** You know what; fortunately we belong to a Governing Body Foundation institution. We register and we pay a yearly fee and we can phone them, we can phone them for advice say to them there's a labour issue. Even when I had to charge...not me... but the Police charged one of my teachers. I phoned; I sent a message to my IDSO (long pause) till today I haven't heard anything from him. That teacher was dismissed after a year because of child abuse. The support I received was from the Labour unit and then from Head Office. Actually from Labour, but from the IDSO, nothing! Not a letter, not even to ask what happened to that teacher as to date. So that is the problem. I phoned the Governing Body Foundation that day, the guy said to me you don't wait for District Office; you don't wait for your IDSO. You report it to your IDSO, then you follow procedures to phone the police, contact this person, this person and then you're off the hook. Otherwise you're going to be charged because of people neglecting reports like this.

**Interviewer:** That's actually terrible. My next question might be difficult for you to answer but you can refer to times when the school received good support from the IDSO. What is your experience of the current role that the IDSO is playing to provide guidance in terms of leadership, management and governance?

**Interviewee:** To summarise the whole situation, he had a vision. As a newly appointed principle he enrolled me for the ACE course, and let me tell you ACE is one of the best courses you can follow as a principal in management, in labour, in policy and in managing the school; understanding people. And that was my experience with the previous IDSO. He had a vision, to see principals being

empowered... to function in the school positively and not sitting there for the wrong reasons. So that is my vision for an IDSO, to share the vision or the principal to invite him to functions where I can share my vision and mission for this school. I want to share it with you; you must go back there and say: "you know what, this school is going places."

Share it, be positive with me, and support me. Don't only phone me when you force me to take the learners... that was expelled from school or suspended from school or taken out for the wrong reasons or whatever and say to me "you make a plan! I don't even want to talk to you; you make a plan with this. Put the ball in your bucket!"

Now I don't even have the support that I can say that I'll phone my IDSO. "You know what, here's a parent. This is the road that I walked with these people". The previous IDSO did not even question me; he knew what this school did in all situations and the support given through counselling when particular children became a danger to other people who also has a right to learning. He trusted us to do the right things. I never feared him.

The current IDSO I haven't even met so one I don't know him. We haven't even met in a Circuit meeting. I saw him for the first time at a function where other people informed me that this was the new IDSO! I don't know what is the support he'll provide, I don't know what kind of person he is, I don't know if he's got LSEN experience nothing.

But what I do know is that as a leader I was greatly empowered by the ACE course and that was a vision of a person. I didn't even know the ACE course. I tried to get my deputy principal on the ACE course. I phoned the District I asked them is there still space, can I send that guy I see there's some bursaries at UJ, he wants to do this and I want to support him. No reaction...

**Interviewer:** You refer to the District Office in terms of Labour issues and HR. Which departments or sections within District Office do you think plays an important role in supporting school's SMT and principals?

**Interviewee:** I think the HR department...and I think they're failing us. The Director when he started this year as a newly appointed Director was the one who raised

certain things that actually made the principals happy. Teachers at schools, therapists in schools that are to be appointed, and our paperwork are done long before and they neglect to appoint people. People of are not getting there subsidies people are not getting they're subsidies for medical aid for, for years. It's unacceptable. So HR is the main foundation for education because you can't expect the people to perform if they don't get a salary, you can't expect for people to perform in a centre if they know I'm good enough. (long pause as an afterthought) ja I think HR.

**Interviewer:** How do you think the IDSO of the school can contribute to play his or her part in insuring that the relationship between schools and other offices within the District Office, for instant HR, can be improved? Do you think that IDSO can play a role?

**Interviewee:** Definitely, definitely. He has the power to go to a department and say "this is one of my schools and in my schools I want everything to be smooth, my principals must be happy. This person is not happy because she can't or appoint a panel beater that is a very scares skills teacher because there's no salary" It's my responsibility to go to HR to submit recommendations for payment but the IDSO can play a major role in ensuring to make things happen faster. That is what the director said we must complain about to our IDSOs or whenever you see there's nothing done, when the people are never there actually to help us in HR. They're never there. You can phone, you phone this morning there's a teacher not getting paid for December and gives school fees money to him and this is illegal according to policy. In the Education policy its illegal for the SGB to pay a person that are employed by government. But that is the case we're sitting with and I can't lose that teacher at the end of the day so I have to make a plan. But I don't have the support ,I say the IDSO's must be the one together with the principal to stand up and say you know what that was in the best interest of the child, that was in the best interest of the teacher and that why the principal acts like this and feeling at the moment and I think its amongst all the principals is that if something went wrong the principal are in the fire and the IDSO is not the one to say no I'm standing up for this person there was hundred rights and one wrong lets sort this wrong ... so that I think is a major thing, they can play a role even in labour issues, I had to wait three to four months to

appoint somebody to substitute the person that was arrested for child abuse. My IDSO could have gone to HR and say you know what this is an important matter. The problem is this “hulle wil vure dood slaan” they don’t want to prevent and that’s the problem.

**Interviewer:** Do you think in the case of LSEN schools with various forms of specialisation, not only the curriculum but also the learner and the learner needs, that the IDSOs are equipped to support LSEN schools?

**Interviewee:** (pause) I don’t know all the people there, but at the current moment there’s no expert who can advise us in a Special school like this, not only on curriculum but also on the way of dealing with these (pause) children in the school. That was the concern of all the LSEN school principals and that was a positive step earlier in the year for the Director to meet with all Special school principals where we had a forum and sat together to indicate the differentiation in disabilities at various schools in the District, and we asked for one IDSO that has the understanding of these differences in disability to lead us. There’s a difference in curriculum, there’s a difference in between all the schools in the programmes that we run. A simple example is the nine learning areas as per the National Curriculum; we have to divide this in a time table where half the time we have centre subjects that are not registered like panel beating, motor mechanics, hairdressing, building, hospitality, needlework. Many of these subjects those are not currently included in the curriculum. In the timetable we accommodate time for training learners with barriers to learning. We have to deal with the break time. We asked for support from curriculum to perhaps take the main subjects with the practical subjects. We put in reading labs to help the learners. (Pause)

Everyone takes notes and then afterwards nothing happens. So I believe or I experience it that sometimes people are willing to help but because they don’t have the knowledge they will rather withdraw, so my feeling will be (longer pause) take an expert, a person from an LSEN school and appoint him at District as an IDSO. Put him in charge of the LSEN schools, so that he can come in with an understanding, going out with this experience to District and say to the Director “you know what these are my LSEN schools this is what’s happening there this is brail”. I heard a story the other day, in one District officials went to the school and the IDSO brought

some people along from District. He asked the principal “do you need that book with the dots on” and the principal said you know what we’re a school for deaf, brail is actually for the blind. This is from the IDSO from a school in Johannesburg. So that is the kind of feeling that that we as principals experience. Perhaps it’s not the person ... I think it’s because of knowledge (pause) and I think affirmative action plays a role in the sense of people going through the ranks because of this equity (longer pause) but knowledge falls apart along the way. So I think that is key, but that can play along, I’m sure of it.

**Interviewer:** If you were to reflect by going back to the relationship that existed between the IDSO, whom you refer to in a very positive way, and the school. What was the characteristics of that IDSO that stood out for you that made you feel that the person is really playing the role in monitoring and supporting the school?

**Interviewee:** I think visits, visibility with the staff coming to the staffroom talking to my teachers... say to them “you know what, you’re a special school not everyone can be a doctor but somebody has to fix the doctors car”. A simple thing like this. coming to the school, walking through the school... observing what’s going on in the centres... acknowledging the teachers and often saying “this is lovely. Can I order it from you? I want to put it in my house because I want to say this is made by *name of school*.”

Not only for this because it’s the type of school that are we. We can’t stand on a stage and say we’re an excellent academic school receiving prizes in D12 for the best matric results but there’s a different way that we can make an input in the District. We can make cards for them; we can prepare menus for functions. So acknowledge that although we’re different, there is expertise between the teachers here and we are here for a calling, we are here for a special aid.

And I think that made him a different person. He made time to come to the school. He often visited the school, knowing very well what’s going on in special schools. He made an effort to say “but you are catering for this”. He was a humble person who would phone and say “you know what I’m not sure about this but there was a guy that came to see me. I want to enroll this child. Do you think this child’s profile suits the school?” Not saying to me “you will take this child because he dropped out in

this school!” He said to me “what do you think is the best? Will we going into a relation with these parents to place the child here on a temporary basis and see if he’s going to cope here?” There was monitoring assistance throughout with this IDSO. The person was available even if he had to phone you after hours, coming back to me to say “I see you were looking for me, I was in a meeting. Do you need my help? Can sort it out over the telephone or tomorrow morning I will quickly come and see you.” (pause) So I think that was the relationship. Another example that I can use was during a circuit meeting. He said to us that we must trust our deputies... if I come to the school... and perhaps you just went out to the shops... they must tell me you went out to see if you can find a sponsorship for your school... so close must be your working relationship. You see that was the thing. You need not phone him the moment you leave the school premises, as long as your deputy or the person who’s taking care of the school knows what is going on. “Mrs. PR3 went there with the deputies for a meeting or whatever. I’m in control. Do you need any help?” That was the trust relationship that existed. And with other people you need to phone when you leave the premises... if something happens when you’re not there you must explain; and that was like a ‘policeman situation’. So that was not nice as a responsible person to experience.

**Interviewer:** You spoke of the relationship that should exist between the principle and the deputy principles. From the district office and in particular the IDSO unit, was your SMT ever involved during visits from the IDSO to sit in for discussions?

**Interviewee:** This positive IDSO called my two deputies in, we are sat together during an IQMS discussion and he said “you know I know the principal as this but you’re working with the principal; in this area... why only this low score?” and then the deputies will say “but this and this and this” to give reason for IQMS rating. “Where is the improvement? Where’s this or that?” So they were involved in IQMS evaluation. Otherwise it was a one-on-one interaction. The feeling was that they are down there, at a lower level. They were not in involved. There were disciplinary issues, where I had to call them as witnesses, because they were involved with the case or whatever. I don’t want to speak on behalf of them but from feel their perspective I don’t feel they were comfortable with the IDSO because actually they didn’t feel included. I think it’s important in all cases that my deputy principals must

also have a leeway to phone the IDSO and say “you must come; we think there’s a problem with the principal”. I think that door must be open because it is also developmental for them; it is also for them to gain experience. Tomorrow they can be a new principle in another school and therefore they must be exposed to things happening in the office and at the end of the day they must be the people that will sit with their IQMS and say “we have learned this from you but you can learn this from us”. I heard what is said to first phone the District, get permission, put it in writing. But it is the small things that isn’t prescribed in the policy that you can learn...by your experience as a principal. So I think it is important for the IDSO to be involved in the SMT, especially with the senior management.

**Interviewer:** Do you think that informal visits from the IDSO to educators in the classroom or staff room can make a difference? If so what positive contribution is made by the IDSO being more visible to the staff?

**Interviewee:** I know that visibility is important, when we had a staff meeting, educators indicated one of the concerns of the staff was: my visibility in the classroom and in the centres. Because we’re sitting in the office busy with paperwork and whatever, so they said to me “you know what you need to walk on the school grounds and for the learners to see you, be visible in the school or be visible in a classroom, make a visit and talk to one of the learners. Be there don’t come on the board ... say to children you’re a good class...” And therefore I say the same standard of the schools must apply for the staff to have a positive attitude. With the previous IDSO we invited the IDSO to our staffroom. He had something to eat with us, we sat together to reflect on what the teachers are doing and he stood up to thank the staff for hard work through the year. That is the ideal, which is the view... the glasses through which staff views the District.

At this moment the view is this: some people don’t get money, they deducted money for the strike-action and we did not even strike, wrong deduction for medical aid. It is not good, this is not right but if the IDSO could come to the school and say “you know” ... like the Director said “I apologise on behalf of the District, this is what is happening...” That was a positive thing towards the principal because all the principals took time to attend the yearend function. Because you know a person can make a mistake, don’t kill the messenger... so at the end of the day when the IDSO

comes to the school to explain certain things and to put it in context to us and say” I’m here for you people if there’s complaints” and come back with one thing that he resolved, that would be positive towards the teachers.

**Interviewer:** You spoke of a staff analyses from the ACE management course and the influence of the SWOT analysis in your school improvement plan where you look at your nine focus areas. Have you ever had feedback on your school improvement plan after submitting it to District Office? Or a roll-out of development for that took place as a result of the SIP submitted to District Office?

**Interviewee:** A few of them but via the ISS (Institutional Support Services) department because I think they’ve got a vision for LSEN schools. So there were courses available, and eight of my teachers are enrolled at the University of Pretoria to complete the Disability ACE course. So I think this is the view of one person at Head Office that is coming through to school and I think... I can say, I think we tried from our point of view to expose ourselves to programmes from Head Office and to the District to say “you know we are here please” and I encouraged my staff to say to them “you know what if you want to have your job or the next ten years then we must fight for LSEN schools. The inclusion is a good thing, but the inclusion has its own problems. Let us do what we do here... don’t become an academic school because then they can close us down and say you can go to another high school. We must concentrate on the skills, that’s why we are here and I think the skills programme with the MEC and also government saying there’s a skills scarcity in South Africa. I think where we using what we have and that is currently working for us and that is good for the school. I think our previous Director and the current Director understands LSEN and I think they will fight for LSEN schools in their District because I think the LSEN schools in the District are currently also setting an example to all schools. Although we have our problems, but with what we do in the programmes that we offers... there’s progress and we absorb a lot of learners that has nowhere else to go.

Previously before my ACE, with the previous principal, they had a different view on the school developing plan and stuff like that. From the ACE there is only one way to do it, do it from the Bottom-Up. Get it from the bottom, in order of preference and put time-frames to it and then we deal with it. So that is how we do it and I think it is time

for us and District to work closer with problems in the schools because actually... whatever occurs in a school will then be the District's challenge as well.

**Interviewer:** What will be your suggestion or recommendation to an IDSO who has a newly appointed principal, especially in a LSEN school? What do you think the IDSO should look out for in supporting and developing a principal that has been appointed at a LSEN school?

**Interviewee:** What will be the ideal solution: partner this person up with another LSEN school principal. So when you do your statistics for your Surveys make an appointment to sit down to show the person how to do it. Because some of the IDSO don't even have the knowledge how we count and weigh pupils in a LSEN school. Newly appointed, if you weigh people and you don't have the experience, link that person up because it's going to make your life as an IDSO easier. To say "you know what, I want you to walk the way with this person for a year ". Therefore the IDSO should know the LSEN schools principals well enough to be able to choose a person because of his IQMS; because of his achievement in the National Teachers Award... he will be the excellent LSEN school principal of the district. This person will be our role model; we will use this person to train the trainee.

**Interviewer:** That's a fantastic idea. We've spoken broadly about the ideal IDSO and the optimal support to be rendered to schools. In your opinion what is your current experience of the IDSO... regardless positive or negative...what is your opinion of an IDSO's role?

**Interviewee:** Positively the IDSO can play a major role in a school. (pause) Negatively we can cope without the IDSO, if things are going the current way. And if it's not a positive influence on me, if it's a stress factor on me, then I don't want an IDSO. I'll rather get support from my lifeline that I've built throughout the time as principal. But if they can be functional and if they are training for them; and I think instead of having a 'Bosberaad' have a SWOT via the principals especially on IDSO's. And then they go and sit and say "there are the challenges, what can I do to help in HR? What can I do to help in Labour?" Let us set out in the next two to three years to do a course in Labour Relations, the IDSO together with the principals. To remind one another of cases, the policies applied and then we'll be on

the same page. We will understand the Circular in the same way through workshop But at the current moment because of we having different IDSO's because different schools shifting around there's no continuity. The situation is up then down.

Like I said to you, in the last five, six months I didn't even receive a phone call from the IDSO. The last time I saw the IDSO was when he was at Head Office doing his own programme and he came to ask me for help. That was the last time that I saw the previous IDSO. Then the last time I saw this IDSO who is on study leave is when she signed off my ACE evidence. So there's no use in an IDSO if they're not functional... but they can make a difference. They definitely can make a difference; they can make our lives as principals better... definitely.

**Interviewer:** Obviously the best interaction is human interaction in terms of visits, but you also mention telephone calls to and from the IDSO. Would you consider it appropriate if the IDSO communicate with principals via SMS or e-mail?

**Interviewee:** It would be appropriate because the mail that we receive from, the district at the moment... we would rather collect it from another school, because we had our own communication line in the past just to see that we end up at the right place for meetings and to not miss out on meetings because sometimes it happens, then you are in trouble. So I think that would be a good thing, the communication between the two would be nice or even from HR or from all departments at the Office.

**Interviewer:** You mentioned the ACE programme and this programme is all about leadership and management, administration, but also governance. How did the Ace contribute towards your better understanding of being a principal?

**Interviewee:** I think it empowers you in the first place and if you feel empowered, you feel in control and if you are in control you can do anything. So you can face new challenges, you can sit together with people (because you are working with people) and because of your knowledge you can say to the person "you know what, I know that the policy says this but let's do it this way" and we agree to a point. Communication skills I think it's a good thing. The policy, that's one thing I learned. Policy is not there to always... you know criticise... it is there to keep you in line, to let you keep people in line with policy. Because sometimes it is difficult as a leader to

say “no” to a person who you know the school is dependent upon; but to put feelings aside and say to them “it’s against policy to have this”. It makes your life much easier. So the whole ACE approach was positive because in your own school you see the challenges and new things happen afterwards. Like I said to you, I didn’t do a project just for the sake of doing a project. To me it was a dream that came true. The finance part, the management plan, people responsible and I know how to manage it. I think previously your diploma or degree taught you how to teach but there was nothing about management. And that’s the thing that you have to learn through experience and sometimes a role model. The main thing from ACE is, that there’s one way, the correct way and do it that way.

**Interviewer:** Going back to the role of the IDSO. In which of the areas, choosing between management, leadership, administration or governance, would you appreciate help from the IDSO?

**Interviewee:** (long pause) I think all over. I think all over the IDSO must be like a sub-principal of that school. Although he’s got thirteen or more schools, I think there must be one day a week or two days a month that he sets apart for *name of school* and my problems on management. Even if I had to call a teacher or call an AA or a GA to say “come and explain to this person. This person has more power than the principle”. And for us to agree in the presence of the person, that this is the right thing to do. Then there’s power in the relationship, then there’s a feeling of empowerment to do things. So all over I think the IDSOs have a major role to play, even in discipline. To talk to my learners at assemble and say to them “I’m the IDSO of your school and I’m supporting the principal and the staff in disciplinary matters. This is what the law states; it’s not what the teachers who preach to you the whole day”.

We invited our previous IDSO to an athletic event for disabled learners in our sport league. He came to open the event for us, on the morning he ‘cut the ribbon’ to declare the event open. Teachers were using sign language when the national anthem was sung, that’s the involvement we had with the IDSO. The whole deal of LSEN, the whole deal of my all of my schools. You know that very IDSO took us to a school in Soweto, there wasn’t even a road to travel onto, small asbestos class rooms, no staff room facilities. He took us there to show us how privilege we are, to

have a office, a staffroom where people can meet to have lunch together. I came back to my staff to relay this message.

The IDSO can play a role to make up a family of schools in education and especially in LSEN schools. I think of the newly appointed therapist that I had to send to school A to learn from their therapists, to observe the way they operate there. We have a new system now at school where therapists are appointed and we have to get systems in place. I think that's the role that the IDSO is supposed to play. To come to me as a principal and say "you know what I know you've got a new therapist group in the school, go to school A, go to school B to observe and then come up with your own plan. Come and sit with me let's see if this is working for you or come after six months and say to me you know what it's not working me."

**Interviewer:** Thank you for your input and the contributions you've made.

