

Management & Leadership

POLICY

LEADERSHIP

MANAGEMENT

GOVERNANCE

for South African Schools

In this Issue

The President and the principals - is this the start of something new?

Take the Lead 2
The first in our series on Strategies for School Improvement.

Teacher Laptop Initiative 5
The teacher laptop initiative has finally become operational.

Education in the MTSF 6
The Medium Term Strategic Framework released in July provides useful insights into the future direction of education.

The 2009 Education Budget 10
All that is important in the 2009 Education Budget as presented to parliament.

The President and the principals 12
What the President told the principals at the Imbizo in Durban.

SAPA's reports on the Presidential Imbizo .. 15
Representatives of the South African Principals Association (SAPA) were invited to attend the Imbizo and report on their experience of it.

In this edition we continue our exploration of the possible changes that the Jacob Zuma government may introduce to basic education and the implications that these may have for schools. Since the publication of our previous issue, a number of events have taken place which we believe provide greater clarity about the things the government plans to do to improve our ailing school system. These include the first budget speech of Minister of Basic Education, Angie Motshega, the release of the government's Medium Term Strategic Framework (MTSF) document at the end of July, and the recent Presidential Imbizo with 1 500 principals which took place in Durban on Friday 7 August. In this issue we have devoted space to each of these events in an effort to keep you, our readers, informed about possible policy changes which may affect our schools and those who lead and manage them. If we were to identify a single theme or focus which emerges, it is that the pressure on schools to perform, in terms of academic results, is going to increase. What is also clear is that it is the principals of schools who will be forced to bear the brunt of this pressure. During the course of the next two years, principals and their management teams can expect to be faced with school-specific performance targets which will include the results pupils will be expected to achieve in externally-validated assessment measures such as NSC examination results and externally-set and moderated Literacy and Numeracy tests in Grades 3, 6 and 8. The introduction of a more rigorous form of assessment at the end of Grade 9 also seems to be increasingly likely. All of this translates into pressure on principals to boost pupil outcomes. Reading between the lines, it is also possible that principals may be put on performance contracts, linking their conditions of employment to the performance of the pupils of the schools that they head.

While there are also promises of greater support for schools and more and better training for principals and teachers, it will be some time before these programmes are developed to the level where they are able to provide the kinds of intensive skills-based training that inexperienced and aspirant principals need if they are to deliver the kinds of results that the system will be demanding of them. This is particularly true for those whose only experience of management and leadership is derived from working in largely dysfunctional schools. The training provided as part of the ACE: School Leadership courses, which are presently being piloted at a number of universities, has some merit but needs to be revised to make it less bureaucratic and more experiential and skills-based. What is needed is a model similar that provided by the National College of School Leadership (NCSL) in England. The NCSL was established specifically to address the challenges of school leadership in England and there is ample evidence to show that this has led to a significant improvement in the quality and success of state schools in that country.

However much we may wish it were different, the capacity of our PEDs and District Offices to deliver quality training is generally not what it should be and this is

Continued on page 12

SM&L

is published 10 times per year by Ednews. It is editorially and financially independent and it is not affiliated to any organisation. It seeks to provide the leaders of South African schools with current and relevant information on issues of policy, leadership, management and governance.

Strategies for School Improvement

Take the Lead

The research is clear - school improvement depends on the extent to which principals have the capacity and the will to take the lead. Without good leadership there will be no meaningful change.

This is the first in a series of articles that we will be running over the next 10 issues which will focus on what principals and their leadership teams can do to improve the quality of their schools. We will focus particularly on what needs to be done to improve the academic performance – the results pupils achieve in externally-validated assessments such as the NSC examinations and the departmental systemic evaluation tests for Literacy and Numeracy - as well as the well-being of the pupils. The articles will include such topics as leadership; the best way to articulate vision/mission statements to make them meaningful, strategic planning, team-building, and ways to maintain and monitor performance and progress.

In this first article we will address the importance of leadership in turning around faltering or failing schools. There is one thing that is important to stress from the outset: successful school leadership is a demanding business and is not for the faint-hearted. Leading a team or organisation in challenging circumstances and from mediocrity or failure to success is even more demanding and takes determination, courage and commitment. The ability to meet this challenge, however, and to turn poor performance into great results is in many ways the best measure of leadership qualities of any leader. What distinguishes these winning leaders, whether captains of teams, school principals, or the leaders of large multinational organisations, is their willingness to make tough and often unpopular choices when they believe that these decisions are in the best interests of their team, school or organisation. School Leadership is a challenge, but as many principals have discovered, it is the kind of challenge that brings with it great personal satisfaction and the knowledge that one is making a difference in the lives of others.

Everyone has dreams for the future: dreams that carry with them the hope that the future will one that is good for them and for their friends and families. Most people also live their lives and perform their work in the hope that their efforts will help them to realise

these dreams. The dreams of leaders include thoughts about the future success of their group, their team, their organisations or their school and what needs to be done to make these dreams a reality. Those who are good leaders are able to articulate these dreams in a way that makes it possible to share their ideas with others and to persuade their followers that the dream is attainable and worth pursuing. Driven by self-belief about the contribution that they can make, the great and successful leaders are single-minded and tireless in their determination to do what needs to be done, often to the detriment of their own health or well-being.

Think of Nelson Mandela and his dream of a free

South Africa, or Gandhi's dream of an independent and united India, or Paul Kruger in his quest for a South African Republic, independent of Britain, or Cecil John Rhodes with his dream of a British colonial empire in Africa, stretching from Cape Town to Cairo. Sadly, not all individuals who are successful leaders are also good people and some

have dreams that may necessitate the enslavement and dispossession of others or the destruction and pollution of the environment. Much of the recent history of South Africa has been shaped by the clashes of the ideals of these four men. Men like Hitler, Verwoerd and Stalin are examples of leaders whose causes and actions are abhorrent to most but there are leadership lessons which can be learned even from these leaders, in the way in which they were able to conceptualise their ideas and turn them into their dark reality.

Philosopher and writer, Isaiah Berlin² in his essay *The Hedgehog and the Fox: An Essay on Tolstoy's View of History*³, based the title on a fragment of a poem by the 7th Century Greek philosopher Archilochus which reads:

The fox knows many things but the hedgehog knows one big thing.

"The message is very clear – if there is not total involvement of leadership in quality, if it is not an obsession, forget it! It will not work and may well be counterproductive. The implication of this is that before the issue of quality is raised within the school the quality of leadership needs to be explored."¹





Berlin used the notion of the fox and the hedgehog as described in this short line of verse to symbolise the two different ways in which he considered writers and thinkers viewed their world. According to Berlin, hedgehog-type people try to conceptualise their world and/or the universe as single unit made up of interlinking parts with their relationships governed by universal laws. To hedgehogs, all things are connected. Their focus is on holding things together with one big idea and on understanding how it works.

Fox-like people, on the other hand, are interested in a whole lot of different ideas and they do not really care whether these work together or not. They do not try to make coherent sense of the relationships between the parts and do not mind if some of their ideas about things seem to be contradictory. Berlin suggested that people like Plato, Dante, Proust and Nietzsche were hedgehogs. Marx, Darwin and Galileo are others who could be considered to have a hedgehog-like view of life. It is the hedgehogs who have had the most impact on the world historically – not necessarily always for good of all. Those whom Berlin suggested were more fox-like in their worldview were Balzac, Goethe and Shakespeare.

Jim Collins, in his book *Good to Great*⁴, suggests that the leaders of the Good to Great businesses that he describes in his book are people with a hedgehog-like fixation about what needs to be done for their businesses to succeed. It is this fixation that helped these leaders to build highly successful and enduring organisations, businesses that significantly outperformed their competitors over an extended period of time. In his books⁵, Collins also provides further interesting ideas about the leadership and the strategies used by these leaders to achieve their purpose, and about the timeframes involved in moving an organisation from being simply good to being the best of its kind. There are lessons principals can learn from the way in which these leaders approached their task.

Collins' model of leadership is hierarchical with five levels, with each level representing increasing degrees of contribution, of competence, of foresight, and of complexity. His descriptors for each of the 5 levels are given below⁶.

Level 5: Executive

Builds enduring greatness through a paradoxical blend of personal humility and professional will.

Level 4: Effective leader

Catalyses commitment to and vigorous pursuit of a clear and compelling vision, stimulating higher performance standards

Level 3: Competent manager

Organises people and resources toward the effective and efficient pursuit of predetermined objectives

Level 2: Contributing team member

Contributes individual capabilities to the achievement of group objectives and works effectively with others in group settings

Level 1: Highly capable individual

Makes productive contributions through talent, knowledge, skills and good work habits

This list provides interesting ideas about leadership and the kinds of contributions that different individuals and post levels within a school can and should make in exercising their leadership capabilities. As a principal, one has a right to expect that every teacher will contribute at least as a Level 1 leader. SMT members should be expected to make the kinds of contributions that are defined by Collins as Level 2 and Level 3 leaders. Principals should have the knowledge and skills to be able to exercise Level 3 leadership at least; and their efforts should be directed at developing their skills and competencies to the kinds of levels that Collins classifies as Level 4 and Level 5 leaders. Collins further describes Level 5 leaders, who are the leaders who contributed to the "greatness" of the Good to Great companies that he analysis in his book, as follows:

"Level 5 leaders channel their ego needs away from themselves and into the larger goal of building a great company. It's not that level 5 leaders have no ego or self-interest. Indeed, they are incredibly ambitious – but their ambition is first and foremost for the institution, not themselves."

Re-written as a descriptor of successful principals it would read like this:

Level 5 principals are more interested in creating a good and successful school than in their status as the principal of the school. It is not that they are not ambitious but their ambition is for the long-term success of their school rather than for their status as principal of that school.

There are important lessons for everyone involved in leadership positions in education from this and all involved need to take this lesson to heart if we are to improve the performance of our schools. We need to use the performance of our pupils as the measure of our success and as the measure of the value of our contribution as leaders. If pupils do well and if their results improve, it is a sign that principals and teachers are doing their jobs and are exercising the

Continued on page 4

Continued from page 3

leadership responsibilities entrusted to them. If, however, pupils perform poorly, as (sadly) is the case in the majority of schools at present or if results begin to decline, this is a sign that our educational leaders are failing to exercise their leadership responsibilities properly. It is not just the principals who are at fault for this underperformance. Every leader at every level must take responsibility for this failure and it is those in the most senior positions at national, provincial and district level who should be held most to account because it is they that have the most authority and the greatest power to make the difference that matters.

Collins and his team describe the leaders of the “great” companies as “fanatically driven, infected with an incurable need to produce results” and as having “unwavering resolve to do what must be done”. In explaining the term “professional will”, they use the following descriptors:

“Demonstrates an unswerving resolve to do whatever must be done to produce the best long-term results, no matter how difficult”

“Sets the standards for building an enduring great company; will settle for nothing less”

“Looks in the mirror, not out of the window, to apportion responsibility for poor results, never blaming other people, external factors or bad luck”. Oh that this were true of the leaders within our education establishment!

One of the curious features of our public education system is the use of the term “school managers” to describe the heads of schools by some people within the education establishment. Describing school principals as “managers” is typical of the approach preferred by bureaucrats who sit in grey offices all day, creating the forms and producing policies that have become such a burden to teachers and principals. One could derisively suggest that the use of this term is in itself an obstacle to school improvement efforts because it suggests that principals are merely there to manage schools on behalf of the department rather than to take a lead in doing what is best to meet the needs of that specific school. It is not that good management is not important, it just that its focus is on good bureaucracy rather than on doing what needs to be done to attain a different and better future.

The list below from the book *Managing Quality in Schools*⁷, illustrates some of the differences between management and leadership. Both are important for school improvement but the first step in this process must of necessity be the step of the leader.

Leading is concerned with

- vision
- strategic issues
- transformation
- ends
- people
- doing the right thing

Managing is concerned with:

- implementation
- operational issues
- transaction
- means
- systems
- doing things right

As West-Burnham points out in his book “No school ever improved without being led⁸”, every principal needs to remember that improving the performance of your school ultimately rests on your shoulders. All the evidence from research into the factors that determine pupil performance point to just two factors that make the greatest difference: the quality of the principal and the quality of teaching in the classroom. One can measure the quality of the first by measuring the extent to which the second happens every lesson in every classroom. ■

References

¹ J West-Burnham, *Managing Quality in Schools: Effective Strategies for Quality Based School Improvement*, (Harlow, Longman, 1992), p.112

² Sir Isaiah Berlin (1909 – 1997) was a British philosopher who wrote a number of books including *The Hedgehog and the Fox, Studies in Ideas and Their History*.

³ I Berlin, *The Hedgehog and the Fox, Studies in Ideas and Their History*, (Weidenfield and Nicolson, London, 1953)

Material on Isaiah Berlin also sourced from websites: http://www.kheper.net/topics/typology/Fox_and_Hedgehog.html

<http://plato.stanford.edu/entries/berlin/>

⁴ J Collins, *Good to Great: Why Some Companies make the Leap and Others Don't*, (London, Random House Business Books, 2001).

⁵ In his books Collins defines “great” companies as those that outperformed their similar successful peers (“the good companies) in the same industry by a significant margin.

⁶ *Good to Great* p.20

⁷ *Ibid* p. 117

⁸ *Ibid*

Teacher Laptop Initiative

The teacher laptop initiative finally became operational on 1 July this year.

The teacher laptop initiative became operational on 1 July this year. Initially this perk will be made available only to the most senior teachers but the intention is that all state-employed teachers will qualify for what will become part of their remuneration package. Qualifying teachers will receive an allowance of R130 per month towards the cost of the laptop. The amount is based on an estimated minimum total cost of R11 750 for the laptop, software and insurance, spread over 5 years. This provision allows for the laptop to be replaced at 5-yearly intervals. The aim, according to the initial announcement of the initiative, is for every teacher to have a laptop for their own use.

The Teacher Laptop Initiative Policy¹ published by the Department of Education sets out the minimum specifications for the laptops and also the conditions that must be met in terms of usage, by qualifying teachers. This will take the form of a code of conduct with the emphasis being on the use of the laptop to improve the quality of teaching and learning. The laptop specifications include the following:

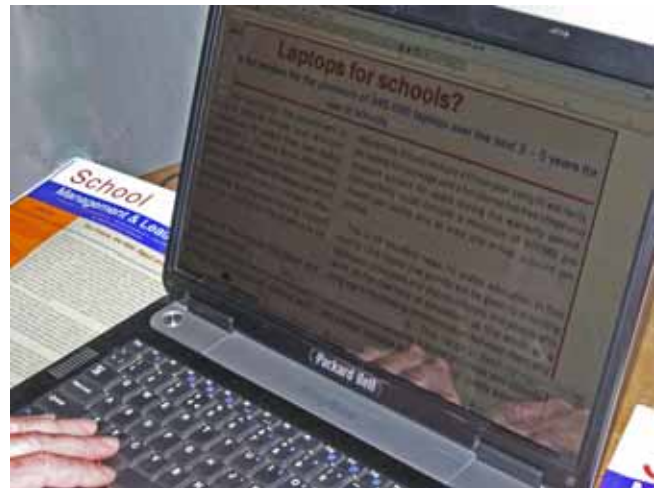
- Loaded software must include Microsoft Office Enterprise (2007) which includes the full set of Microsoft Office programmes (Word, Excel, Outlook etc.) and Symantec Anti-virus software.
- Loaded content must include the school administration package of SA-SAMS and all National Curriculum Materials, both of which are provided by the Education Department.
- Loaded teacher development materials must include Microsoft Digital Literacy and Microsoft Partners in Learning.

The Department has put a number of systems in place to ensure that the process of acquiring the laptops is not abused and that the laptops are used for their intended purposes. These include a requirement that the laptops be available for inspection by officials of the Education Department; that teachers download important information from the DoE or PED when required to do so; that school principals maintain a register in which they verify, on a quarterly basis, that each teacher's laptop is accessible and is being used for its intended purpose; and that the teacher send an e-mail to a specific address in the on the first of every month and provide details as a means of confirming that the laptop is in their possession and is being used.

Because the management and funding of the initiative rest with provincial education departments, the roll-out is likely to vary from province to province with the most senior teachers first in line to benefit from the programme. ■

Reference

¹ The information and policy documents can be downloaded from the DoE website <http://www.education.gov.za/>



SM&L Comment

The Education Department must be commended on what is an excellent initiative and one which, if used properly, should make an enormous difference to the working lives of the principals of rural schools and the district officials who service them. Because many of these schools do not have access to a Telkom landline, the only means of communication between the school and the district and provincial offices, are cell phones. Now by making use of their laptops and the cell phone networks, the principals will be able to send and receive e-mails and faxes and to download information from the DoE and the thousands of other websites which offer valuable resources to schools, all at the touch of a button.

Education in the MTSF

The recently-published (July 2009) Medium Term Strategic Framework (MTSF) document sets out the government's plans for the period 2009 – 2014, including its plans for education.

The Medium Term Strategic Framework (MTSF) is a planning instrument used by the government to articulate its plans in the medium term, normally a period of 5 years. The MTSF in turn is used to develop the government's Medium Term Expenditure Framework (MTEF) which provides a broad outline of how the government intends to allocate its funds for the following 5-year period. The MTSF is normally reviewed annually by the Cabinet and may be adjusted in the response to changing circumstances and the extent to which progress has been made in implementing the strategy.

The MTSF for the period 2009 – 2014 was informed by the government's electoral mandate as well as by information gleaned from its Fifteen Year Review and a scenario planning process with the title "South Africa Scenarios 2025: The future we chose?". Scenario planning uses data gathered from a range of sources to develop alternative models ("scenarios") which predict how the future may unfold. Each model portrays a different future, with the differences determined by likely consequences of differing policy decisions and how these are implemented. In this instance, three scenarios of South Africa's future for the period 2010 – 2025 were produced and used to guide the thinking behind the MTSF document. A brief outline of these three scenarios is provided in a separate box. Cognisance was also taken of the UN Millennium Development goals and this country's commitment to achieving these goals.

5 Strategic Objectives

The document lists 5 strategic objectives and 10 priority areas which are seen as defining the government's Electoral Mandate.

The objectives are to:

- Halve poverty and unemployment by 2014
- Ensure a more equitable distribution of the benefits of economic growth and reduce inequality
- Improve the nation's health profile and skills base and ensure universal access to basic services
- Improve the safety of citizens by reducing

incidents of crime and corruption

- Build a nation free of all forms of racism, sexism, tribalism and xenophobia.

10 Priority Areas

The 10 priority areas which the government considers necessary to achieve these objectives are listed as:

- More inclusive economic growth, decent work and sustainable livelihoods
- Economic and social infrastructure
- Rural development, food security and land reform
- Access to quality education
- improved health care
- The fight against crime and corruption
- Cohesive and sustainable communities
- Creation of a better Africa and a better world
- Sustainable resource management and use
- A developmental state including improvement of public services.

Setting the country on a higher and sustainable growth trajectory is seen as central to achieving these goals. However, the current global recession has, according to the authors, made sustained economic growth unlikely before 2014. As a result, for the period covered by the MTSF – from the present to 2014 – the focus is to be rather directed at mitigating the effects of the recession while simultaneously building the capacity necessary for improved economic growth from a more diversified economic base, in the future. In practical terms the aim is to protect jobs, expand employment opportunities, and offer social protection through, amongst other things, the launch of major infrastructure programmes and public works projects and the expansion of public services such as health, education and social work. One hopes that this translates into more teachers, doctors and other health professionals and social workers. Interestingly, despite the difficulties posed by the global economic recession, the document



Three Scenarios for the period 2010 to 2025

Scenario 1: Not yet Uhuru

This scenario depicts a Government strongly committed to accelerating economic growth through optimising conditions for private investment, but which struggles to achieve its goals in the face of slow growth and minimal sharing of benefits, deteriorating global conditions and severe ecological challenges.

Scenario 2: Nkalakatha

This scenario depicts a more cohesive society as a result of government articulating a compelling national vision and fostering partnerships, while playing a more central role in the economy, prioritising poverty reduction and skills enhancement.

Scenario 3: Muvhango

This scenario depicts a government that battles to govern well despite an initial resurgence of the economy and positive world conditions. This because of poor planning, lack of coordination, slow policy implementation as well as internecine and debilitating warfare within the party-political arena.

Note: Each of these scenarios represents a model which attempts to predict the likely consequence of policy decisions that the government may enact as well as the extent to which the government is effective in ensuring that these policies are implemented. They are used to help clarify thinking and to identify potential opportunities and challenges.



makes it quite clear that the government remains committed to halving unemployment and poverty (relative to 2004), and to universal access to electricity, water and sanitation in decent community settlements by 2014.

The document lists 10 "Strategic priorities" which will be used as the drivers of the processes needed to achieve these goals.

1 speed up economic growth and transform the

economy to create decent work and sustainable livelihoods

- 2 (a) massive programme to build economic and social infrastructure
- 3 (a) comprehensive rural development strategy linked to land and agrarian reform and food security
- 4 strengthen the skills and human resource base
- 5 improve the health profile of society
- 6 intensify the fight against crime and corruption
- 7 build cohesive, caring and sustainable communities
- 8 pursue regional development, African advancement and enhanced international co-operation
- 9 sustainable resource management and use
- 10 build a developmental state including improvement of public services and strengthening democratic institutions.

It is strategic priority 4 - Strengthen the Skills and Human Resource Base – which provides the best indication of the government's plan for education over the next five years and which we believe will be of most interest to our readers. The aim of this strategy, according to the document, is to "focus our skills and education system towards the delivery of quality outcomes". The document then lists 9 "elements of the strategy" – essentially sub-goals – together with steps in plans to take to achieve them.

Strategic Priority 4: Strengthen the Skills and Human Resource Base

Element 1: Creating a culture of achievement and improving learner outcome with a target of an overall 20% improvement in key education indicators by 2014 and improving South Africa's position in cross-country tests.

Element 2: Increased participation in and improved quality of early childhood development services, with universal access to Grade R and double the number of 0 – 4 year-old Early Development learners by 2014.

Element 3: Expand access to and capacity of secondary education with a view to increasing enrolment rates to 95% by 2014 and ensuring that as many young people as possible are able to access and complete secondary education.

Continued on page 8

Continued from page 7

Element 4: Within the next 2 years provide adequate basic services such as water, sanitation and electricity to schools; and progressively improve access to facilities such as libraries, classrooms and laboratories.

Element 5: Government will intensify efforts to ensure that all schools have safe and supporting environments for all children.

Element 6: Supporting and developing a teaching profession that is dedicated to providing education of high quality, with high levels of performance as well as ethical and professional standards of conduct.

Element 7: Creating conditions for effective school management including ?? functions and performance management.

Element 8: Broaden access to post-secondary education and improve higher education throughput rates by 20% by 2014 including access by people with disability.

Element 9: Ensuring that training and skills development initiatives in the country respond to the requirements of the economy, rural development challenges and social integration. The main aim would be to increase the number of skilled personnel in priority skills areas.

Each of these elements includes a list of reasonably detailed actions that the government plans to take to achieve these goals. Some of these are provided in separate boxes elsewhere on this and the adjacent page. It is a comprehensive and challenging list and includes items which will require the government to confront the more militant representatives of the teacher unions - something that it has been reluctant to do up to now. ■



Development Indicators

The MTSF document lists 76 Development Indicators under 9 headings. They are based on the UN Millennium Goals and will be used to measure the extent to which the government achieves the goals set out in the MESF. The 9 headings are:

- Economic growth and transformation
- Employment
- Household and Community Assets
- Health
- Education
- Social Cohesion
- Safety and security
- International relations
- Good governance.

Development Indicators for Education

The Development Indicators for Education are:

- Educator: Learner ratio in public ordinary schools
- Enrolment rates: Gross Enrolment Rate (GER), Gender Parity Index (GPI)
- National Senior Certificate (NSC) pass rate
- Matriculants with Mathematics Passes
- Adult literacy rate
- Graduating science, engineering & technology (SET) Students

Gross Enrolment Rate (GER) = Total number of learners in Gr. 1/Total number of 6-year-olds in the population, as a %.

Gender Parity Index (GPI) = Ratio of Girls to Boys in a particular grade. (In 2009 it is 0,97 for primary schools and 1,05 for secondary schools, meaning that there are more boys than girls enrolled in primary schools and more girls than boys in secondary schools.)

MTSF Creating Conditions for Effective School Management

The Medium Term Strategic Framework (MTSF) sets out the following strategies that the government plans to implement to create the conditions for effective school management:

- Providing principals with training and administrative support so that they are better able to fulfil their management functions.
- The use of performance standards for schools to improve accountability. The performance standards will be used as the basis for evaluating the performance of principals and their management teams. The standards will include learner targets for each school.
- Formal management training will become a pre-condition for appointment as principals and heads of department.
- Devolving adequate powers to principals to ensure that they are able to manage effectively. Guidelines for the devolvement of these powers will be developed within 2 years.
- Performance management functions will be created at district level with district officials providing support to schools. There will also be frequent monitoring of teaching, attendance and resource allocation. The functions of the advisory service – one assumes this refers to subject advisors – with the National Education Evaluation and Development Unit (NEEDU) for quality assurance purposes.
- Performance-based contracting and a performance appraisal system will be put into effect for managers by 2010.
- Key indicators of a well-managed school will be defined and these will include instructional leadership, professional support, resource management and efficient resource utilisation with a focus on results.
- Promoting the involvement of parents in exercising oversight functions in schools in a manner that adds value to the attainment of core outcomes. There will be a special effort to ensure that parents in rural and poor communities are empowered to perform their functions in this regard.

SM&L Comment

The information provided in the adjacent box which has been extracted from the MTSF, makes it clear that the government is determined to drive school improvement by exerting pressure at district and institution (school) level. School principals and the professional staff at District offices are therefore likely to bear the brunt of the political pressure that will no doubt be exerted on the system in an effort to achieve these goals.

The idea of including school-specific learner targets as part of the performance standards for evaluating principals and SMTs is an interesting one. It suggests that the department intends profiling schools to establish what these targets should be, in much the same way as has happened with the norms and standards of school funding, where schools are placed in “poverty” quintiles. So one is likely to find that the learner targets will be determined by such things as a school’s norms and standards quintile, whether it is an inner-city, urban, township or rural school, as well as the size of the school in terms of pupil numbers and its facilities and resources, such as the availability of municipal water and electricity, and whether the school has a library, science laboratories and ICT access.

It is a model that has been used in England where schools are clustered and compared according to their demographic and resources profile. It is sure to be contentious but is a model that needs to be implemented if the issue of accountability in our public education system is to be addressed. Whether teacher unions will support it and whether there is the capacity in the system to develop and implement it in the time frames suggested, are questions that will only be answered in time. Given the current levels of dysfunctionality at provincial level in some parts of the system, we think it is unlikely to happen in the near future.

It also seems clear that the National Education Evaluation and Development Unit (NEEDU) is likely to be established in the near future. The post of Head of the Unit has already been advertised in the national press. The provision of sufficient funding may, however, limit the unit’s ability to deliver on its mandate. We say this because the final report of the committee tasked with investigating and making recommendations about the need for such a unit estimated that the annual cost of a fully-staffed unit would be approximately R420 million. The amount set aside in the current financial year for the establishment of the unit is just R6 million! There is a full report on the 2009 Education budget and the Minister of Basic Education’s budget speech on pp. 10 - 11. ■

Minister's Budget Speech

On 30 June Minister Angi Morshekga presented her first budget as Minister of Basic Education under the theme "Together achieving quality education and access for all". What was interesting was her willingness to acknowledge the problems that beset our public school system.

The theme of Minister Morshekga's first budget speech as Minister of Basic Education was "Together achieving quality education and access for all". What was interesting about it, besides the budget-related content, was the extent to which she was willing to acknowledge the problems that currently beset our public school system. In her address, as is to be expected, she listed some of the government's achievements in the education over the past 15 years. These are substantial and despite the many shortcomings of the system we should not forget how significant they are. Those she mentioned include:

- Almost universal primary education, in line with the UN Millennium Development Goals
- Gender Parity in education
- More children are staying at school until Gr. 12. Current estimates are that 85% of children now receive 12 years of education in either schools or colleges.
- Improved results in numeracy and literacy - the improvement from 2007 to 2008 having been described as "significant and unprecedented" by the Organisation for Economic Co-operation and Development (OECD)
- Stabilising matric results and "general consensus that the curriculum is more demanding" and that "examinations have got much tougher".
- The increasing number of 'no-fee' schools which make it possible for more children attend school "without the burden of school fees".
- The increase in the number of children receiving free school meals as part of the National School Nutrition Programme.
- An increase in the number of teachers and principals who are exposed to in-service training.

- Improvement in school infrastructure particularly in rural areas.

In identifying and describing the extent of the challenges faced by her department, the Minister made reference to some of the findings of the report on National Education Evaluation and Development Unit (NEEDU) and included this quote from that report.

"..there are many countries, including some of our closest neighbours, that perform better in international benchmark tests than we do with significantly lower levels of per-pupil funding."

"Throughout the country in each of the provinces, from government officials, unionists, and teachers alike the Committee heard the strongest expressions of concern, often in very passionate terms, that there was an indisputable crisis in education, and that it needed to be resolved; indeed, it would be a serious mistake to underestimate the depth and intensity of concern among all education stakeholders."

Challenges

Amongst the challenges she listed were:

Accountability

Describing the school accountability system as "weak, uneven and limited", she suggested that the reason for this was the result of a "pervasive culture of resistance to strong measures of accountability within schools". Not only teachers were blamed for this and she expressed the need for greater levels of accountability at all levels in the education system and for there to be "consequences for every action". She reiterated the mantra that "Teachers on time, daily teaching, learners learning, is non-negotiable".

Curriculum-related problems

The Minister used an extract from the ministerial report on "Schools that work" to describe the curriculum challenges identified by these schools, the most important being the failure of the >>

The 2009 Education Budget at a glance

Budget allocations for the financial year 2009/2010 is R21.287 billion, an increase of R2.49 billion (12.9%) over last year.

The additional funds have been allocated to the following priorities:

- Higher Education subsidies – R 480 million
- School nutrition – R577 million (This makes it possible to fund school nutrition programmes to quintile 1 secondary schools)
- Recapitalisation of technical schools – R5 million (Planning for implementation to take place over the next two years)
- National Education Evaluation and Development Unit (the NEEDU) – R6 million
- National Student Financial Aid Scheme (NSFAS) – R63 million
- Mass Literacy Campaign - R443 million,
- Systemic Evaluation programme (R5 million)
- The further development of EMIS (R5.7 million),

Other items identified by the Minister include:

- A conditional grant on the budget of R2.394 billion for the National School Nutrition Programme which feeds 7.4 million children on a daily basis during school terms.
- A conditional grant of R177 million to be used provinces to provide relevant life skills programmes in all schools. This is partly in an effort to strengthen programmes aimed at further reducing HIV infection rates in the youth and in addressing a troubling increase in teenage pregnancies
- R700 million to support the more than 9 000 student teachers currently in the system.



curriculum, in its implementation, to address basic competencies of literacy and numeracy.

Other challenges identified by the Minister included the “alleged” excessive paperwork burden, the costs involved, the risks of different interpretations, the inadequate preparations of teachers and the challenges around classroom practices. In an effort to understand and address these problems the DoE plans to conduct investigations to test the validity of these claims as well to conduct public hearings on these issues over the next four months.

The need for strong leadership and management

The Minister emphasised the importance of strong leadership and management and the contribution that a principal can make in this regard by inviting Mr Timothy Mathopa and his wife to be present when she presented the budget. Describing Mr Mathopa as “a true hero, representing many other principals running schools serving some of our poorest communities”, she went on to provide some interesting insights into Mr Mathopa’s professional career. He was apparently a “very difficult teacher, constantly fighting his former principal for poor leadership, lack of commitment and dedication to his work”. The district officials apparently got tired of having to deal with the constant tensions at the school and dispatched Mr Mathopa to one of their worst-performing schools to teach him a lesson. The school in question had a zero pass rate but through his leadership and commitment this increased within a year to a pass rate of 57%. From there, in succeeding years this went to 92% and in 2006 to a 100% pass rate. According to the Minister, Mr Mathopa is one of the few principals serving poor communities who has enrolled his own children at his school. One must salute him. We will try and make contact with Mr Mathopa to learn what he did to turn around this school so we can share his strategies with our readers.

Resources

While acknowledging that many schools were under-resourced, the Minister noted that the problem lay more with the allocation and utilisation of resources than a lack of acceptable levels of funding. In this regard it is worth noting that there are many countries, including some of our closest neighbours, that perform better in international

Continued on page 12

Continued from page 11

benchmark tests than we do with significantly lower levels of per-pupil funding.

The Minister also warned that the economic downturn would necessitate “belt-tightening” measures.

The re-organisation of education

Basic education will include all schools from Grade R – 12 as well as Adult Basic Education programmes.

Higher Education and Training will include universities and all post-school education and training. This will mean that the FET colleges will now fall under the Ministry of Higher Education.

Principals meeting with the President

The meeting of the principals and the President was planned for 7 August in KZN.

Rural School

The Ministry of Education plans to work with the Ministries of Rural Development, Public Works, Water Affairs and Transport in an effort to alleviate the plight of rural communities. School funding norms have been revised to ensure that small rural schools are guaranteed a minimum level of funding, irrespective of the number of learners attending the school. The department also plans to follow the successful approach developed by the provincial education departments of the Free State and North West provinces who have been able to consolidated small rural schools by providing pupils with hostel accommodation.

School Infrastructure

The Minister indicated that she planned to follow the model and example used in the construction of the 2010 stadiums in an effort to improve the rate at which the department is able to deliver new

Minister indicated that she planned to follow the model and example used in the construction of the 2010 stadiums in an effort to improve the rate at which the department is able to deliver new schools.

schools. She also hoped to absorb some of the capacity of the construction companies for this purpose once the stadiums have been completed.

This is an extensive and challenging list of promises and it remains to be seen whether the Minister, her department, and the Provincial Education Departments are able to deliver on these promises. The government has made much of its promise to deliver and there are already signs that the poorest and most marginalised communities are growing restive as a result of raised expectations attributed to promises made at election time. There have also been protests by parents and pupils from at least one school community about illegal teacher stay-aways. The one thing that we cannot afford at this time is for community protests to spill over into the school system, particularly if it pits parents and pupils against teachers and education department officials. ■



Schools without electricity and running running water like this one in the rural Eastern Cape will be a thing of the past if the Minister has her way.

Continued from page 1

The President and the principals - is this the start of something new

unlikely to change in the near future. If the DoE and PEDs hope to achieve the kinds of improvements that they envisage, they will need to bring in the private sector, not only to build and refurbish more schools as has been suggested, but also to improve the nature and standard of the training that is offered to those who are expected to lead and manage our state schools. We have decided to make our own small contribution in this regard and this issue sees the first of series of articles that we plan to carry over the next 10 editions which will cover the strategies and practical steps that principals can take to bring about improvements in their schools. ■

The President and the principals

The meeting of President Zuma with approximately 1 500 principals in Durban on Friday 7 August was an Historic moment for principals in that it provided the first clear acknowledgement by government of the critical role that principals can play in improving the quality of our public school system.

How it came about

On Friday 7 August President Zuma met approximately 1 500 principals from across the country at the ICC in Durban. The possibility of a “Presidential Imbizo” for principals, hosted by the Department of Education (DoE), was first raised by the President in his first State of the Nation address. Although funding for the event was provided by the DoE, it was essentially a joint project involving both the DoE and the PEDs, with the provinces funding the transport and accommodation costs of the principals that they selected to attend. PEDs were obliged to select principals according to criteria jointly agreed to in consultation with the DoE. These criteria were:

- Geographic spread – principals were to be selected from schools representative of all regions of the province
- Economic classification – principals of schools from all quintiles and school types
- Gender
- Race
- School performance. The document indicates that 40% of those selected should be from schools experiencing leadership problems and poor performance and the remaining 60% from schools which performed well.

Although all provinces were represented, the numbers of delegate-principals attending from each province varied significantly. The numbers allocated to each province also do not seem to have been linked to the number of schools in the province or the pupil population of the province. (See the adjacent box for the number of principal-delegates allocated to each province.) Besides the invited principal-delegates representative of each of the provinces, an additional 600 principals from KZN, the hosting province, were invited to attend as “observers”.

Number of delegated principals per province

Eastern Cape	100
Free State	155
Kwazulu-Natal	280 (600 to observe)
Gauteng	100
Limpopo	70
Mpumalanga	65
Northern Cape	30
North West	70
Western Cape	30

It was obvious from the way in which the Minister framed the initial proposals for the meeting that it would be used as an opportunity to address principals about the need for them to take greater responsibility for the performance of their schools. This was indeed the case and in her address of welcome, Minister Motshekga made clear that she and her department understood the importance of school leadership and the vital contribution that principals can make to the success of efforts to reform schools and to improve pupil performance. In acknowledging the critical role principals play in determining the success of school improvement efforts, the Minister made it abundantly clear that in future principals would be held accountable for the success of their schools and for the performance of the pupils at their schools.

The Minister acknowledged that principals would need support if they were to do their jobs properly and assured those present of the DoE’s commitment to providing principals with training and additional administrative support for this purpose. She indicated that an ACE: School Leadership qualification would in the future become a prerequisite for appointment as a principal. She also indicated that more powers would be devolved to principals so that they could manage their schools more effectively. No information was provided, however, about the nature of these powers, although she did indicate that the appropriate changes would be made within the next two years. Comments made later by the President in his address suggest that these may include giving principals a greater say in the appointment of staff. All of this suggests that principals are likely to be held increasingly accountable for the performance of their schools.

Supporting this contention was the statement by the Minister that the performance of principals and the

Continued on page 14

Continued from page 13

management teams of schools would in future be measured against a set of school-specific performance standards including "learner performance targets". In making this statement, the Minister called on parents and community members to support the DoE in this regard by providing oversight in schools in a manner that will help the DoE to monitor progress.

What the President had to say

In his opening remarks, President Zuma indicated that he would have preferred to have held a meeting with all of the country's principals but because of the logistical impossibility of this, he invited those present to see this meeting as the start of an ongoing process of engagement with principals. Future follow-up interactive meetings with principals at provincial level would be planned in order to take this process forward. The President went on to say that the reason he decided to call for a meeting with school principals was that he felt the need to emphasise that it was his government's view that education is its "apex" priority because they see education as the "most powerful weapon in the struggle against poverty". Their other priorities are health, rural development, land reform, the fight against crime and the creation of decent work.

While noting that significant progress had been made in certain aspects of education since 1994 including the following:

- high enrolment rates in both primary and secondary schools
- an enrolment rate of girls in schools that was amongst the highest in the world
- approximately 600 000 children now attend crèches or pre-schools
- expenditure on education has increased by almost 15% a year for most years since 1994.

The President expressed concern that our educational outcomes are below standard. He went on to provide some thought-provoking examples of just how poorly we have performed relative to other countries, including our neighbours.

- In recent international tests for Grade 6 Literacy, South Africa scored 302, while the international average was 500.
- In Mathematics tests for Grade 8, South Africa came last with a score of 244. In the same test which had an average score was 467, Botswana scored 365.

The President noted that while the serious and destructive consequences of apartheid and "Bantu" education had left a negative legacy which ran deeper

than many had imagined, there were certain realities in our current education system that needed to be confronted. These included research findings which showed that while teachers in formerly whites-only schools teach for on average 6.5 hours a day, their colleagues in schools in disadvantaged communities frequently teach for just 3.5 hours a day. There are also teachers he said, that needed to know that Fridays and paydays were ordinary working days. In making these comments, the President indicated that he intended to play an active part in monitoring school performance and would be making unannounced visits to schools to ensure that the non-negotiables of his government were being adhered to.

Making it clear that he, like his Minister of Basic Education, considered the role of principals as critical to any school improvement efforts, the President went on to identify five things that successful principals do:

- they hire well-qualified teachers and ensure that unqualified teachers receive appropriate training to improve their knowledge and skills;
- they ensure that workbooks and textbooks are distributed to pupils on time
- they ensure that teachers are in class, teaching
- they monitor and evaluate the quality of learning of pupils and keep parents informed of their children's progress
- they work with the community and the Department of Education to remove obstacles to learning.

In addition, he noted, principal of schools serving under-privileged communities need to ensure that food is provided to pupils in need, through the services of the National School Nutrition Programme.

The President emphasised that the DoE's decision to introduce a system of performance management was aimed at promoting a culture of accountability within the education system. Part of its purpose is to ensure that principals and teachers know what is expected of them and what they needed to do to help the government to meet its targets. He also stressed that the need for departmental officials to support schools was a "non-negotiable".

Other points raised by the President included the need to invest in skills development for teachers, particularly in the areas of mathematics, science and management training; the government's plan to seek partnerships with the private sector, especially in terms of the need to the train of artisans; and the need to improve the functioning of school governing bodies. ■

A SAPA Perspective

Edie Jacobs and Clive Nel, President and General Secretary respectively of the South African Principals' Association (SAPA) were invited to attend the Presidential Imbizo as representatives of SAPA. In this report by Clive Nel they bring us their personal perspectives as delegates to this important meeting.

Friday, 7th August 2009 saw some one thousand five hundred school principals from all corners of South Africa attend the "President's Interaction with School Principals" at the International Convention Centre in Durban. Here President Zuma acknowledged the crucial role played by school principals and underscored this by insuring that this meeting was attended by almost all Provincial premiers, all the MEC's of Education, together with the National Minister of Basic Education, Angie Motshekga and The National Minister of Higher Education, Blade Nzimande.

President Zuma stressed that he would have liked to speak to all school principals but this was clearly logistically impossible. He acknowledged that to date Education Policies were failing the poorest of the poor. He saw his presidency as a period of renewal for education and this was why he had decided to split the ministries. It was pleasing to note his willingness to be forthright regarding the plight of Education in South Africa. He spoke to the damage apartheid had done to the education of black people in South Africa but continued by asking how it was possible that a free society continues to perpetuate education failure. He challenged those present to consider the fact that even under oppression committed teachers were able to achieve excellence yet at present "black schools" teach on average 3.5 hours a day whilst "white schools" teach 6.5 hours a day. In this way we continue to unwittingly perpetuate apartheid and this problem must be faced.

He acknowledged that this was not the fault of the teachers only but wished to start a "conversation with school principals today", acknowledging that they were the most crucial link in the building of successful schools. He asked school principals to work together to see the return of the days when teachers were respected members of the community because of their conduct and commitment to their pupils. It was therefore expected that school principals would ensure that a disciplined routine would be established in all schools.

Principals were then able to respond in two rounds and the call from those who spoke was very similar in the things they asked for. (See the box on this page.)

The concerns and requests of principals

- The improvement of infra structure
- The re-opening of training colleges
- Review of Quintiles
- The acknowledgement that principals are managers not teachers
- Slow payment of staff
- Slow filling of posts
- Ensuring that teachers are well paid
- Encouraging teachers to work in rural areas

The question of course is – was this a massive waste of money? It was most certainly a great lift to the moral status of school principals in that this, to my knowledge, is the first time that our President has taken the trouble to acknowledge the importance of the school principal and insisted that his ministers acknowledge this too – a great day for the leadership of South African Schools. It was also a great day for the South African Principals' Association in that President Zuma asked if principals were organized and clearly stated that he expected them to become so in

order that he could regularly meet with this organization. I, together with Edie Jacobs, the president of SAPA, attended this meeting as stakeholders having been given the same status as our Unions. At last we as a principals' organization have been recognized and heard.

One must also ask oneself if anything will change. The President clearly stated that he wished to meet regularly with school principals and in my view the door is now open at all levels. School principals must now capitalize on this and ensure that they are active members of the South African Principals' Association so that we can ensure that we have the funds

and members to be seen and be active at every opportunity. Our President has invited us to work together with his Government and we must ensure that we do just this and in so doing we rise and meet this historic challenge.

President Zuma is of course a skilled politician and was careful not to make promises. He did however indicate a clear willingness to ensure that principals were given more power and made particular reference to the appointment of staff. On the other hand both he and his minister made it clear that they did not view the curriculum as a failure. They felt it was in fact good but required some minor adjustment which would be made.

One must conclude that the answer to the two questions must be that it is now up to us. We have been asked to become role players and we have been promised more power, let us use this opportunity wisely. ■

In the words of President Zuma

"..it (education) is our most powerful weapon in the struggle against poverty"

"All the successful countries of the world did one thing in common – they invested in education."

"We have essentially come together to launch a new drive to truly change the learning, teaching and management of our schools."

"We must today dedicate ourselves to put the past behind us and to make education an instrument of freedom and sustainable development."

"All the international studies show that the biggest driver of better education outcomes is the school manager, the principal."

In the words of Minister Motshekga

"International research has shown that school reform depends fundamentally on the effectiveness of school leadership. Such studies have also shown that there is a direct relationship between the leadership of a school and learner performance."

"The weaker the leadership of a school, the poorer are the results of learners"

"..it is near impossible to turn around a poor performing school without the intervention of a talented leader, supported by a team of like-minded colleagues."

".. school principals are critical to the improvement of our levels of learner performance."

"..we also want to empower our principals to take the lead in schools by devolving adequate powers to them to enable them to manage effectively."

"We want our principals to take accountability for our schools and each school will have a set of performance standards on the basis of which the principal and their management team will be evaluated. This will include learner performance targets for each school."

The Handbook for School Governors

The essential reference for anyone elected to a school governing body

The companion volume to the best-selling *Handbook of School Management*, this clear and accessible reference book is the essential resource for all school governors – in primary and secondary, urban and rural, well-resourced and under-resourced, section 20 and section 21 schools.

FEATURES

- 37 sample policies, forms and documents
- 16 useful checklists
- Concise and lucid explanations of the South African legislation
- Roles and responsibilities of the principal and the governing body
- Legal cases involving school governing bodies
- Suggestions on how to handle problem areas
- Useful references to further source material

For more information or to order your copy contact Customer Services at:
Tel: 011 731 3300 | Fax: 011 731 3335 | customerservices@mason1lan.co.za

Kate McCallum
www.macmillan.co.za MACMILLAN

Subscribe

To subscribe to *School Management & Leadership* send your contact details by post, fax or e-mail to:

The Managing Editor
School Management & Leadership
P.O. Box 2612
CLAREINCH
7740
or fax to: 086 689 5971
or e-mail to: subscribe@ednews.co.za
or telephone: 021 683 2899

Annual subscription is R330.00 for 10 copies published approximately monthly from February to November and subscribers will also be able to access the full features of our website at www.ednews.co.za.

Payment can be by cheque, made payable to Ednews, or by direct payment to ABSA, Claremont: branch code: 421 109, account number 919 043 4497.