CHANGING MANAGEMENT TO MANAGE CHANGE IN EDUCATION

Report of the Task Team on
Education Management Development

December 1996

Department of Education
South Africa

414875

414875

Changing Management to Manage Change in Education sets out a framework for developing, refining and institutionalising a new approach to education management which arises from the new provisions for education governance.

This report by the Task Team on Education Management Development recognises that true transformation in education cannot be effected simply by politicians, senior officials and policy makers. It must involve teachers and learners, parents, communities, school principals and governing bodies, and mobilise the energy and resources of government at all levels, training institutions and organised professionals in education.

Chapter One introduces the Task Team on Education Management Development which was set up by the Minister of Education early in 1996 and outlines the process and outcomes of its work.

Chapter Two analyses the legacies within the education system and looks at emerging needs and priorities for education management development.

Chapter Three sets out the new approach to education management and management development advocated by the Task Team.

Chapter Four outlines the key components of an emerging framework for education management development.

Chapter Five provides an overview of the proposed national Institute for Education Management Development.

Chapter Six outlines the Task Team's key recommendations to the Minister, and suggests the launching of an interim initiative as one of the first steps towards a new approach.
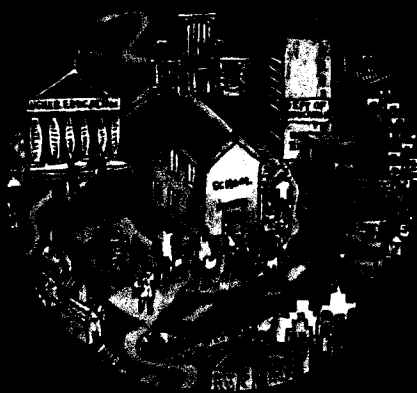
A Letter to the Minister of Education from the Chairperson of the Task Team

Dear Minister Bengu

Over the last nine months the members of the Task Team on Education Management Development have been actively engaged in efforts to carry out the challenging, even daunting brief you entrusted to us. We were all honoured by our appointment, and by your confidence in our ability to tackle this task successfully. In carrying out this brief, we have had opportunities to interact with the widest possible cross-section of South African and international educators and other interested parties. We have all experienced a period of professional growth and tremendous learning, for which we are profoundly grateful. We also believe that, within the time-frame and the resource constraints, we have met our objectives.
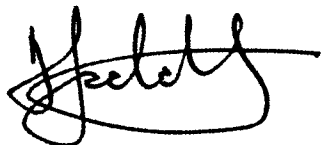
The proposals contained in this report have been distilled out of a process of close observation of the education management realities on the ground; of rigorous analysis of commissioned research, both local and international; a careful review of the relevant literature; a detailed audit of education management development needs and resources; sustained interaction with a wide range of stakeholders and interested parties; and especially, out of a process of intensive collaborative work with core teams of departmental officials from all the education departments. While the conclusions we have come to are not necessarily original, they represent a radical departure from current practice in managing schools in that we propose that schools be placed at the centre of teaching and learning and of education management development.

We have chosen not to attempt to respond in full to that part of our mandate requiring us to prepare detailed workplans, recruiting strategies, budgets, draft statutes and documents required for operationalisation. We believe it would have been inappropriate for us to prepare these detailed documents in advance of consensus on the overall strategy we propose.

We wish to emphasise that this report constitutes only one of a range of products of the Task Team process. A selection of documents generated in the course of our work, and upon which this report draws fairly heavily, will be published and made available to a smaller audience of those specifically requesting it. We are also considering publishing a collection of the international case studies we commissioned.

In drafting this report, we have made a deliberate attempt not to present our busy readers with a bulky tome of dry, uninteresting information and circuitous arguments. Instead, we have tried to express our findings as crisply and succinctly as we could. We trust that we have succeeded, and hope that this will encourage many more readers to plough their way through. Finally, we present this report to you in the belief that the issues it addresses are vital to a better quality education for our children and the generations that are to come, and in the hope that it will make some contribution toward that cause.

Yours sincerely,

Mr Jonathan Godden
Chairperson of the Task Team and Policy Analyst,
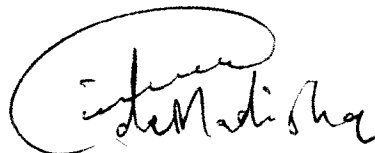Centre for Education Policy Development

Mr Peter Buckland
Director, Education and Training Policy,
National Business Initiative
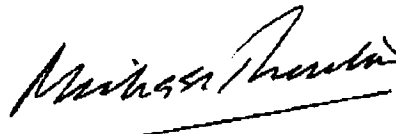
Mrs C Coombe
Consultant in Education Management

Mr Nhlanganiso Dladla
Deputy Director, Education Foundation,
and Director, EduSource

Mr Willy Madisha
Deputy President, South African
Democratic Teachers Union (SADTU)
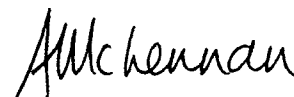
Mrs Nomlamli Mahanjana
Director, Human Resource Matters,
Department of Education, Pretoria

Professor Michael Thurlow
Professor, Department of Education,
University of Natal (Durban)

Professor Rejoice Ngcongo
Associate Professor, Department of
Educational Planning and Administration,
University of Zululand

Ms Anne McLennan
Director, Academic Affairs, Graduate School
of Public and Development Management,
University of Witwatersrand

ACKNOWLEDGEMENTS

TABLE OF CONTENTS

KEY IDEAS FROM THIS REPORT

- The Task Team is convinced that education management development is the key to transformation in education.

- Management in education is not an end in itself. Good / management is an essential aspect of any education service, but its central goal is the promotion of effective teaching and learning.

- The task of management at all levels in the education system, is ultimately the creation and support of conditions under which teachers and their students are able to achieve learning. The extent to which effective learning is achieved therefore becomes the criterion against which the quality of management is to be measured.

- The Task Team believes that the primary focus for any new approach to management must be the school and its community. In our country, schools are the building blocks for transformation of the education system. It is in schools that the culture of teaching and learning must be recreated, and the foundational lessons of democracy learned.

- Management should not be seen as being the task of the few; it should be seen as an activity in which all members of educational organisations engage. Management is about doing things and working with people to make things happen. As such it is a process to which all contribute and in which everyone in an organisation ought to be involved.

- The approach we are advocating emphasises that everything is driven by the values and mission of the school and that these are developed and owned by more than just the principal or some school authority. A true culture of teaching and learning, as well as a supportive management culture, can only thrive in a school where the major stakeholders feel ownership of the school's mission and ethos.

- *For us, the implications of decentralised management in the education system suggest:*

  - ◆ *the development of managers through education, training and long-term support*
  - ◆ *the development of management by embracing good management practice, and*
  - ◆ *the development of organisations by developing and sustaining effective structures, systems and procedures.*

- *These elements are interrelated, and depend on a participatory and holistic approach to the management of schools.*

- *In building the competencies of individual managers, we believe that what is required is a shift in emphasis from training the individual towards support for individual development within the context of organisational development. In these terms, education management development comes to be seen as a process whereby the achievement of organisational goals and the meeting of individual development needs become harmonised. Management development is placed within the context of whole-school management and becomes an integral part of the day-to-day management of schools.*

- *The vast complexities of our education transformation, the scale of our need, and the great diversity of training providers, require that we harness all our development capacity in practical networks and nodes of cooperation. Government needs partners — in the non-governmental and private sectors, in training institutes, colleges and universities — if management is to reach every classroom, every teacher and every student.*

- *The Task Team's vision for education management development might by loosely characterised as a focused, managed network; a dedicated core group of researchers, practitioners, university teachers, policy makers, representatives of government authorities, non-governmental organisations, teachers and community leaders who form a professional network supported, to some extent financed, and sustained from a principal locus.*

EXECUTIVE SUMMARY

How can the goals for improved learning and teaching in a transformed education system be realised? This report by the Task Team on Education Management Development, set up by the Minister of Education in February 1996, seeks to give some answers to this question.

The legacy of apartheid in the field of education is well-known: it has left the country with an education system that is characterised by fragmentation, inequity in provision, a crisis of legitimacy and in many schools, the demise of a culture of learning as well as resistance to changing the way things have been done in the past.

This report seeks to build on the new directions that have been clearly established by the policy framework and the new legislation, and proposes numerous strategic recommendations for a new approach to education management development. At the heart of these recommendations lies a concern that the schools, as the centres of teaching and learning, be placed at the core of education management and education management development, rather than at the bottom of a hierarchical and bureaucratic management pyramid.

The implications for the education system as a whole, and more specifically for the management and governance of education, are profound. Schools will require on-going assistance and support, including additional financial, professional and other resources, if this vision is to be realised. Education departments, particularly those structures at district and circuit level, will need to reorient themselves so as to be able to provide the requisite assistance and support most effectively.

These structures in turn will need to draw on a wide and diverse resource base, including schools themselves, tertiary institutions, non-governmental organisations, the private sector, professional organisations, the international community, and the networks of dedicated institutions proposed in this report.

The report offers guidelines for achieving the goal of improved quality of learning and teaching. The central thrust of this is capacity building – developing the ability of institutions and individuals to perform effectively. Such capacity building must address five key components: strategic direction; organisational structures and systems; human resources; infrastructural and other resources; and networking, partnerships and communication.

The report advances a proposal for the establishment of a national institute for education management development, focusing largely on issues related to the mission and governance of such an institution. Should consensus be reached on the need for such an institute, detailed attention will be given to the operational side of it. Finally, the report proposes an interim initiative in education management development which is intended to function as a bridge between the work of the Task Team and the implementation of the recommendations contained in this report.

— Chapter One —

EDUCATION MANAGEMENT DEVELOPMENT: THE KEY TO TRANSFORMATION IN EDUCATION

This chapter introduces the Task Team on Education

Management Development which was set up by the

Minister of Education early in 1996 and outlines the

process and outcomes of its work.

As South Africa emerges from the years of struggle against apartheid, its people face the challenge of transforming a society weakened and corrupted by misrule, mismanagement and exploitation into a vibrant and successful democracy.

Transformation involves every aspect of South African life. Major steps are being taken to transform the economy so as to promote growth with equity and justice. Social institutions are being transformed through prison reform, restructuring public safety and defence institutions, and reconfiguring social welfare, housing and health services. In each sphere there is an urgent need to change, not simply the scale of provision and access to services, but the very nature of those services and the way they are conceptualised, resourced and delivered.

The education system is no exception. Far-reaching organisational and structural change is required to address the severe imbalances in provision and strong bureaucratic controls over the system.

Imperatives for change in education

The new Department of Education radically shifted the direction and vision of the education system after 1994 with a series of policy initiatives and new legislation. These national policy frameworks contain clear implications for planning and effective

> — **“** —
> The task of transformation is greater than reconstructing the systems and structures which sustain any society. It requires a fundamental shift in attitudes, in the way people relate to each other and their environment, and in the way resources are deployed to achieve society's goals.
> — **”** —

management in the education system. The provisions of Department of Education White Papers One and Two, the report of the Review Committee on School Organisation, Governance and Funding (the Hunter Committee Report), the new national legislation (the National Education Policy Act and the South African Schools Act), as well as provincial legislation and policy documents, all point South Africa firmly towards a school-based system of education management.

Already, education administration has been devolved from national to provincial levels. The establishment of school governing bodies country-wide will place substantial decision-making authority in the schools, which will be supported by provincial and district authorities.

However, by early 1996 there had been little substantial planning about how best to set in place the structures, systems, processes and procedures appropriate to South Africa's new needs in the management of education. Training for leaders and managers – whether in schools, governing bodies, or administrations – has continued on a 'hit and miss' basis, and the numbers reached have been small in relation to the need. The problem is compounded by the lack of a locus for thinking about education management development or for providing the necessary support.

The Task Team's mandate

In light of this situation and against the background of the recommendations outlined by the Hunter Committee Report and other national policy documents, the Minister of Education appointed a Task Team on Education Management Development in February 1996 to investigate ways of institutionalising strategies for education management development in South Africa.

The Task Team's mandate was to:

◆ make practical strategic proposals for improving education management capacity

◆ make specific proposals for establishing a national institute for education management development

◆ consider matters related to resource mobilisation, coordination and management for a country-wide education management development programme, and

◆ provide an interim education management support service.

The Task Team's terms of reference are detailed in Appendix A.

In meeting the last objective, the Task Team planned and carried out, in cooperation with provincial and other authorities, some very practical activities aimed at improving the capacity of education managers at national, provincial, district and school levels, and of school governing bodies.

The process

A representative Reference Group was established to advise the Task Team (see Appendix B) and a nine-month work programme was designed to achieve the Minister's objectives (see Appendix C).

From its inception the Task Team adopted a collaborative approach to its work. Activities included:

◆ a series of consultations with national and provincial departments and potential partners in education management development

◆ a survey of education management development needs and resources – at top management levels in education departments, and at provincial, regional, district and school levels

◆ commissioning studies of trends and good practice in education management development inside and outside South Africa

◆ a series of strategic planning colloquia with core management teams from provincial education departments

◆ consultations with top managers in national and provincial departments, and with representatives of international development cooperation agencies

◆ the development of links with non-governmental authorities and institutions inside and outside South Africa

◆ study tours and visits for Task Team members and provincial officials to observe and analyse practice in South Africa and abroad.

Appendix D provides details of the groups and individuals consulted, and Appendix E lists the documents which were generated in the course of the Task Team's work.

The context of implementation

A hallmark of the government's approach to education and training has been a commitment to address two key priorities: achieving equitable access to education and improving the quality of provision. Within less than two years, the basic policy and administrative infrastructure has been put into place to open up access to the nation's schools. *Improving the quality of learning, however, requires strategies which focus on change at the school and classroom levels.*

Underlying these strategies is a fundamental shift in understanding the concept of governance in education. By governance we mean here the process by which authority is mediated in the system, from the level of the national ministry to the individual school.

The educational policy framework recognises the value of multiple sites of governance, with significant decentralisation of authority to schools and communities. Coherence

in the system will be maintained through effective quality assurance mechanisms, with incentives aimed at rewarding performance and output rather than penalising non-compliance or standardising inputs.

The successful implementation of this strategy depends on the transformation of management in education institutions.

Managers can no longer simply wait for instructions or decisions from government. The pace of change, and the need to be adaptable and responsive to local circumstances requires that managers develop new skills and styles of working. They must be capable of providing leadership for teams, and able to interact with communities and stakeholders both inside and outside the system. They must be able to manage and use information to promote efficiency and support democratic governance. This blurs the distinction between governance and management in ways that require frequent communication between managers and policy makers if both responsiveness and accountability are to be maintained.

The most significant change is that management systems have to be built from the school up. The starting point for management development becomes the process of teaching and learning in the school. The available human, financial, physical and institutional resources must be optimally deployed to support that process and this means drawing on the full range of providers and support networks available for education management development. District, provincial and national management structures must be designed principally to ensure that the managers of the learning process, the teachers and learners, are able to operate as effectively as possible.

The pace of change and the need to adapt and respond to local circumstances requires that managers develop new skills and styles of working.
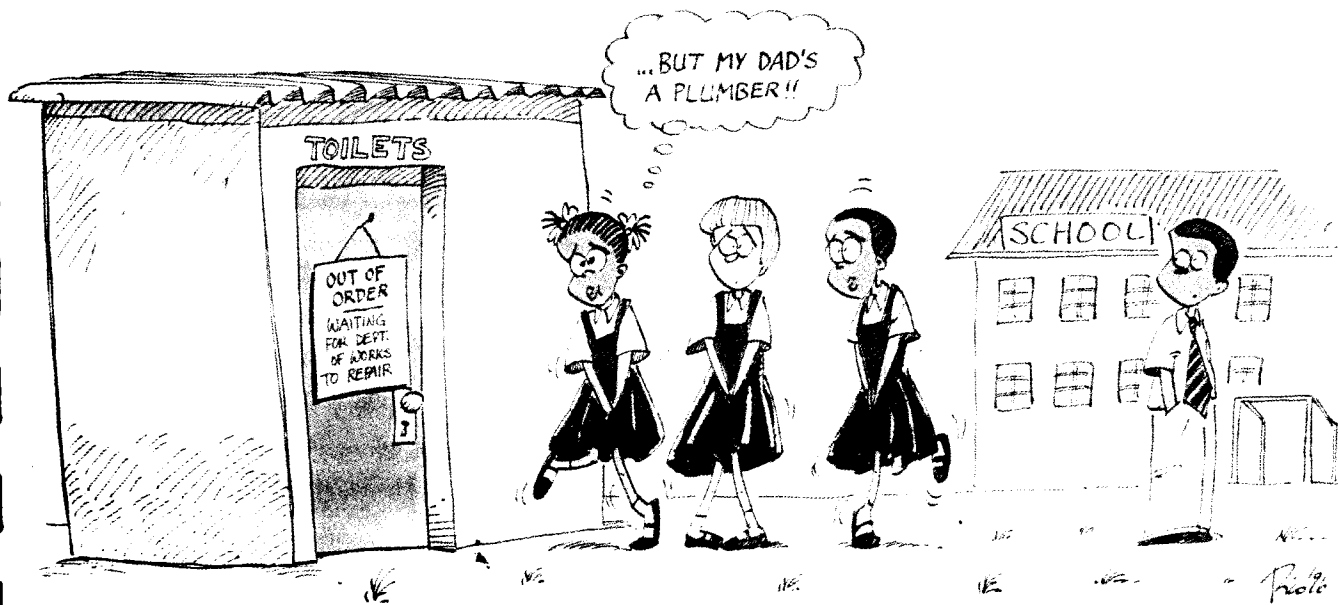
The outcome: reconceptualising education management development

The Task Team's work revealed that there are three approaches to education management currently at work in South Africa.

Approach 1

This approach has characterised public administration in South Africa for the past 30 years. *It focuses on technical administrative functions such as planning, organising, guiding and controlling.* Officials are seen as implementors of policy formulated by elected politicians. This approach dominated the public service during the apartheid years and infuses current thinking on education management. It is the guiding principle behind the restructuring of many provincial education departments and is characterised by a concern with order and control.

In their attempts to deal with the chaos of transition, many managers in the education system as a whole (including those at school level) are focusing strongly on issues such as professionalism, the development of regulatory frameworks and the clarification of roles and functions. This way of thinking focuses on administrative process and generates an approach to management development which emphasises structure. It is largely concerned with defining job descriptions, powers, functions and management relationships.

Approach 2

The second approach attempts to *reduce the emphasis on administrative process. It emphasises the management and leadership functions of managers in the education system as a whole,* including those at school level. It is concerned with *people development* and with the establishment of *management systems* which support education delivery.

The notion of a management team which leads and facilitates change is central to this approach. It depends on management practices which emphasise the devolution of power, mission building, human resource development and school effectiveness. Management development which supports this approach would highlight quality assurance and performance. It would develop leadership and technical management skills so as to ensure effective and efficient delivery within education institutions as well as government departments.

Approach 3

The third approach is concerned with *governance and with the relationship between policy, decision-making processes, and implementation.* It dissolves the divide between politics and administration which characterises the first approach outlined above.

This approach features strongly in the new education policy framework. It implies an emphasis on relationship building, stakeholder participation, the management of

diversity, and development. Here management development would focus on the skills required to build and support the relationships needed to reconstruct a ruptured education system.

If South Africa is to break decisively with its past and implement its vision for our education system, which has the improvement of teaching and learning at its heart, it will be necessary to draw on aspects of all three approaches:

◆ first, to *develop structures and systems* appropriate to devolved decision making within the context of new policy legislation

◆ second, to *develop the leadership skills* needed to manage people, lead change and support the process of transformation, and

◆ third, to *develop individual and team competencies* – the understanding, knowledge, skills and attitudes – appropriate to the day-to-day management of education.

Education management development as the key to decentralisation and transformation requires a broad and more inclusive understanding, and the Task Team argues that it must embrace three important spheres of activity:

◆ *the ethos and practice of management:* articulating and operationalising the principles of good management practice in South Africa

◆ *organisational development:* developing and sustaining effective structures, systems and procedures for improved management

◆ *people development:* empowering managers by building their professional competencies and providing on-the-job support to them.

These spheres of activity are interrelated and that is why we advocate an approach to education management development which is both participatory and holistic. For example, if teachers are not being paid, it is very difficult for principals to manage their schools effectively. Similarly, low morale at district level may reflect a disorganised structure and poor allocation of resources. Each element is fundamentally linked to the other.

\

In practical terms, education management development must be seen as an ongoing process in which people learn, and organisations adapt and adjust, within the context of commonly-held values and standards of performance. As an integral part of the education system, it is a process which seeks to harmonise the current and future goals both of the education system and of individuals in the education community.

The vast complexities of our education transformation, the scale of our need, and the great diversity of training providers, require that we harness all our development capacity in practical networks and nodes of cooperation. Government needs partners – in the non-governmental and private sectors, in training institutes, colleges and universities – if management development is to reach every classroom, every teacher and every student.

— Chapter Two —

WHAT IS THE CHALLENGE?

This chapter analyses the education management

legacies and looks at emerging needs and priorities for

education management development.

Changing South Africa's education and training system is only possible if there is harmony between the vision for transformation and the day-to-day realities of those working in the system.

However, the situation at present is that, while the vision for the transformed education system has been set out in the policy frameworks and the new legislation, the system is still shaped by the ethos, systems and procedures inherited from the apartheid past.

Consequently, the harmony required for transformation is absent. Past education management and education management development practices are hampering the desired transformation process.

Understanding apartheid legacies in education

The education legacy

One of the most visible legacies is the complete fragmentation of the education system which the apartheid era created. The effect was the creation of 17 education departments responsible for schools. In many cases, one or two departments were responsible for schools in the same area, resulting in very inefficient management and use of resources.

The fragmentation went deeper, however. Education was sharply separated from the world of work and training; schools had very little contact with institutions responsible for training teachers; in-service educators had little or no contact with colleges of education; technical colleges and technikons had very little to do with each other or with universities.

Apartheid led to an education system characterised by racial, regional and gender inequality as well as ideological distortions in teaching and learning.

The neglect of the quality of African education, combined with a rapid increase in numbers of students, led to the disintegration of learning environments and the death of a culture of learning in many black schools.

The demise of a learning culture was exacerbated by curricula which had little relevance to the lives and aspirations of the students. Moreover, rote learning and examinations-driven teaching methodology were emphasised at the expense of student participation, problem-solving and critical thinking.

Schooling was structured in a racial hierarchy: white schools were the key beneficiaries of resources; black schools the most disadvantaged. In African schools, the inadequate supply, low qualifications and poor morale of the black teachers took its toll, creating despondency and apathy in many school communities. Students and schools in rural areas were, and still are, the hardest hit.

Education in general was characterised by high repetition and drop-out rates, particularly for coloured and black students.

> **66**
>
> **In general, the education system did not encourage staff and students to take responsibility for what was taught and learnt.**
>
> **99**

Support for teaching and learning in schools was limited to short in-service courses run by state education departments, which focused on content and methodology. Alternative programmes were provided by non-governmental organisations, but ultimately these were thinly spread and had relatively limited impact. Most in-service programmes were conducted in urban areas.

During the 1970s and 1980s the school itself became a site of struggle in the resistance to apartheid. In many cases the resources and relationships which make the school an institution were almost completely destroyed. In other cases new patterns of conduct and networks emerged – some moulded in a culture of resistance, some strengthening resistance to change. While these may have been effective in the years of struggle, they require reconstruction as well as transformation if they are to provide access to quality learning.

The education management legacy

The crisis in schools can be attributed to the lack of legitimacy of the education system as a whole. In the majority of schools this led to poor management and to the collapse of teaching and learning. In many schools, decades of resistance to apartheid discredited many conventional education practices such as punctuality, preparation for lessons, innovation, individual attention and peer group learning. Some school principals were discredited as being 'part of the system'.

Recent changes to the system of education governance have resulted in school heads being unprepared for their new role as 'chief executives'. In large numbers of schools,

information systems have broken down (including basic communication between students, teachers and communities, record-keeping systems and financial management systems) and the necessary management competencies for professional growth, incentives and assessment are non-existent. Furthermore, the virtual collapse of the culture of teaching and learning in many urban and rural schools has eroded the confidence of school principals and heads of departments.

Principals and teachers have consistently been at the receiving end of top-down management structures. They have worked in a regulated environment and have become accustomed to receiving direct instructions from departmental officials. Circuits and lower level structures have tended to function as administrative units only and have been unable to respond to community needs.

Principals and teachers have consistently been at the receiving end of top-down management structures. The challenge now is to create a new culture and practice of teaching and learning.
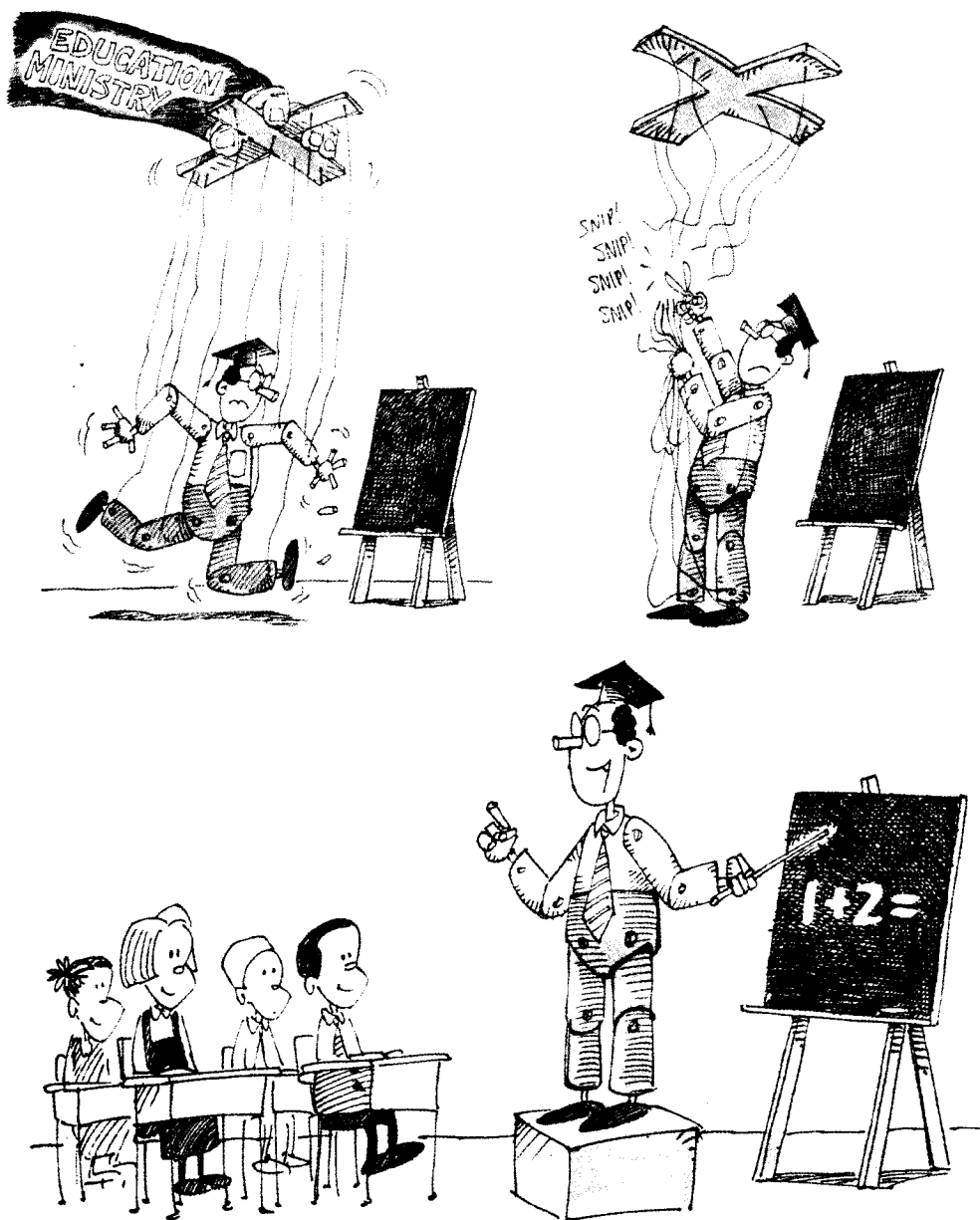
> ❝
>
> **The concept of restoring a 'culture of learning and teaching' has been loosely used in the last few years in South Africa to refer on the one hand to the absence of school-going habits and values and on the other to a loss of faith on the part of school communities in the benefits and legitimacy of education.**
>
> *L Chisholm and S Valley, The Culture of Learning and Teaching in Gauteng Schools. EPU, University of the Witwatersrand, 1996.*
>
> ❞

with little interrelationship between the different levels of activity. This approach still tends to dominate administration and management processes in the public service.

The gender legacy

Past practices in education management reflect broader discriminatory tendencies in the society as a whole. The paucity of women in senior management positions in the education system is testimony to the gender discrimination which has pervaded all levels of the public service.

The concentration of women at junior levels of the public service has perpetuated a stereotype that women are not fit to hold top positions in the education system. This means that the education system has not benefited from the joint input of both men and women at all levels. It also poses a particular challenge if the new approach to education management development (with its stress on collaborative and participative work) is to be implemented effectively.

Assessing the changes to date

The Audit indicates that although pockets of a more open style of management do exist, management in government departments still tends to be caught in old ways of operating. Nevertheless, the inherited personnel, systems and capacity do have strengths which are combining with a rich mixture of newly-appointed personnel who have a strong commitment to transformation.

Within the historical context of apartheid, the South African education system emerged as a peculiar mixture of centralisation and racial/regional devolution. No single education department exerted effective authority over the whole system. Consequently, the capacity to carry out planning, research and management tasks varied from department to department and tended to reflect historical patterns of resource allocation. In addition, there was little public access to the policy-making process.

The Audit shows that structures and systems have tended to follow the traditional formats used in the previous system. The most significant innovation is the attempt by many provinces to introduce 'flatter' organisational structures by devolving limited administration or decision-making authority to regional or district offices. There is also evidence of stakeholder participation in policy development.

Despite the complexity of the system, basic management systems exist and continue to operate more or less efficiently and effectively in all departments of education. Most of the provinces continue to use the inherited management systems, for personnel management and expenditure reporting, for example.

The Audit suggests that the management systems most urgently needed are those

> ❝
> The development of a learning society requires the reclaiming of the education and training system by all the communities in the country.
> National Department of Education Annual Report, 1996, p. 46.
> ❞

which support standardised procedures and records, particularly in areas such as performance appraisal, school performance assessment and communication.

In addition, provinces recognise the need for improved education management information systems (EMIS), but as yet none have an adequate system in operation.

The process of developing effective education policy, management systems and governance structures in the new education system has been constrained by the need to create nine provincial departments and one national department from the diverse systems of the past. The challenge of creating new and effective structures out of the protected older systems has been, and remains, immense, particularly in those provinces which inherited the most fragmented and unequal education systems. Many new appointees have been frustrated by the inherited regulatory framework within which they are compelled to work. While the vision for transformation is clear, the institutional context has not changed sufficiently to facilitate transformation.

Summary of system level management and governance challenges:

- dysfunctional structures

- a mix of old and new styles of management and work ethos

- insufficient appropriately skilled people

- absence of an appropriate work ethos and management vision to drive integration and delivery

- insufficient clarity with regard to roles and responsibilities within and between levels of management

- inadequate systems and procedures

- poor coordination of resources

- inefficient and ineffective delegation

- crisis management.

Training and development

One of the main challenges for education management is the development of an appropriate ethos and capacity in the systems, structures and managers of the education system so as to ensure that the newly defined goals are achieved. This involves clarifying the relationships between the national and provincial education departments, as well as between the key stakeholders in the education process, such as the trade unions, professional associations and civil society organisations.

In the past, the content, methods and location of education management development have mostly been inappropriate.
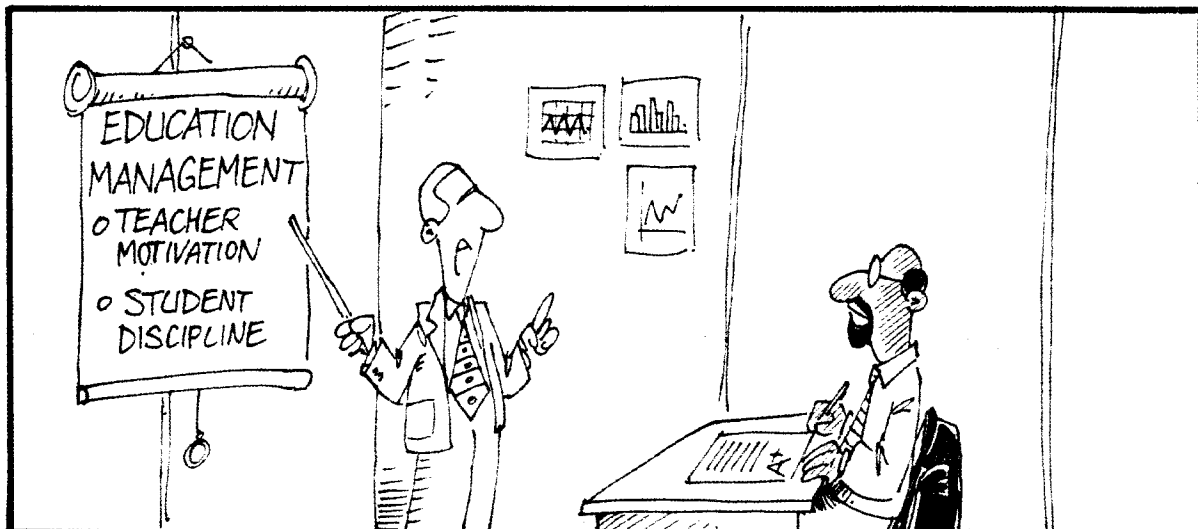
However, management development practices in the past have tended to focus on the collection of qualifications and certificates with little attention being paid to actual ability to transfer this newly acquired knowledge to the institutions in which managers work. This narrow focus on training rather than development is reflected in many of the courses and programmes offered by non-governmental organisations, tertiary institutions and government training departments and Public Service Commissions.

This is due in part because South Africa lacks a national strategy for dealing with the development needs in the field of management and planning. Courses tend to be menu-driven and lack the financial resources and infrastructure for building increasingly advanced management skills. Providers are often isolated from active involvement in meeting training needs. Many programmes are residential, and many of those delivered by means of distance education are inappropriate to the challenges of restructuring an educational system. Although management training is generally perceived as a high priority, the Audit showed that many managers feel that numerous programmes currently offered are too academic and not sufficiently practical for their needs. As a result, many of the training programmes tend to be developed and run in-house. 'Mentoring' is a favoured means of training in the management field, but this usually teaches people how to operate a particular system rather than how to manage effectively.

The content of management development programmes is also inappropriate. Many of the older and more established courses still emphasise the management functions implied in the old approach which was outlined in Chapter One and tend to teach managers how to become efficient instruments of government.

At the same time, it must be acknowledged that many non-governmental organisations and a few tertiary institutions have provided innovative courses where others have failed. These courses have piloted a more development-oriented approach to capacity building, moving away from a narrow emphasis on basic management skills. Instead of focusing on control and delegation functions, courses now emphasise issues such as leadership, organisational development and Total Quality Management.

Government cannot meet all the capacity building needs in the system and will need to make use of diverse institutions and non-governmental organisations to provide management development. In order to address the past focus on training only, education departments need to develop guidelines and work closely with institutions to ensure that programmes are relevant to current management practices and day-to-day work demands. This can be supplemented by the development of appropriate accreditation mechanisms which encourage the provision of practical, professional management development programmes.

Emerging needs and priorities

The picture which emerges from this brief overview is one of disjunction between vision and actual change, both because of the immensity of the challenge for fundamental transformation and because of the enduring influence of past management structures and relations which do not support the desired change. In short, the situation is one in which, notwithstanding the will to change, existing structures and relationships are inappropriate to the achievement of the purposes of educational transformation.

The key challenge to education management relates to the inappropriate nature of many of the existing management systems, processes and structures. New education policy requires managers who are able to work in democratic and participative ways to build relationships and ensure efficient and effective delivery. In addition, very little systematic thinking has been done to conceptualise the education management development strategies relevant to the South African experience. Clearly, in this connection, a key priority would be the development of a shared understanding about education management needs and priorities, and a shared understanding of appropriate education management development strategies through which to address these needs and priorities.

The Task Team believes that through the Audit and ongoing consultations with a wide range of stakeholders, it has begun to discern an emerging understanding of needs and priorities. These can be broadly clustered as involving the development of:

◆ **appropriate policies, strategies and structures** to support the growth of managers. This involves policy development, shared vision, setting aims and objectives and decision making

◆ **systems** which support effective management development

◆ **the ethos and practice of management** to encourage a sense of motivation and initiative. This involves attention to induction, leadership and team development, role clarification, communication and reflective practice

◆ **people with the right understanding, skills, knowledge and ability to do their work.** This depends on the development of understanding and competence in areas such as policy development, strategic planning, project management, office skills, team building, etc

◆ **diversity and equity in the education system as a whole.** This requires the eradication of discriminatory practices which are based on race, gender, disability and sexual preference. The problems of sexual harassment, rape and violence suffered by women (both students and teachers) in the school environment and more broadly in the education system as a whole need to be addressed.

The Audit suggests that there is currently insufficient capacity to meet these needs. Provinces have only just begun to develop policies and strategic plans for meeting these challenges. There is, however, a wide range of providers offering courses or programmes in the field of education management, including tertiary institutions, non-governmental organisations and private sector organisations.

Some of these represent valuable resources in respect of policy and strategy formulation and the provision of opportunities for education management development. Since none of these providers alone has the capacity to address the full range of needs, the development of partnerships and synergistic relationships will facilitate the meeting of many of the management development challenges in the provinces and nationally.

Underpinning all these concerns is the need to begin to develop a view about appropriate conceptions of education management. The next chapter sets out a new approach to education management and education management development appropriate to the needs of educational transformation in South Africa.

— Chapter Three —

THE NEW APPROACH

This chapter sets out the Task Team's suggestions for a

---

new approach to education management and

---

management development.

The approach being proposed by the Task Team is not new in itself. However, it is new to South Africa and we believe that it is appropriate to the challenges of educational transformation identified in Chapter Two.

While we are fully aware of the urgency for action now, we are not suggesting a quick-fix recipe for change. A tension exists between the need to offer practical help to those facing immediate pressures for short-term change, and the goal of promoting an approach which is likely to achieve transformation in the long term.

Some assumptions about management

We believe that management in education is not an end in itself. Good management is an essential aspect of any education service, but its central goal is the promotion of effective teaching and learning in schools.

This view was supported by participants at the first national colloquium on education management development who defined education management in terms of 'creating an environment for effective teaching and learning'. Similarly, participants at the colloquium on the role of tertiary institutions and education management development agreed that the primary purpose of education management development is 'to improve the quality of teaching and learning practice in the education system'.

The task of management, at all levels in the education system, is ultimately the creation and support of conditions under which teachers and their students are able to achieve learning. Management should not be seen as being the task of the few; it should be seen as an activity in which all members of educational organisations engage. The extent to which effective learning is achieved therefore becomes the criterion against which the quality of management is to be judged.

> — 66 —
>
> **Management is about doing things and working with people to make things happen. It is a process to which all contribute and in which everyone in an organisation ought to be involved.**
>
> — 99 —

Finally, we need to clarify our use of the term 'education management'. In our consultations and studies we found that the terms 'management', 'administration' and 'leadership' are used in confusing ways. We have chosen to use the term 'management' to mean the process for creating and supporting effective educational organisations: we do not equate management with administration and we make a distinction between management and leadership.

Starting with schools

The Task Team believes that the primary focus for any new approach to management must be the school and its community. In our country, schools are the building blocks for transformation of the education system. It is in schools that the culture of teaching and learning must be recreated, and the foundational lessons of democracy learned.

The South African Schools Act places us firmly on the road to a school-based system of education management: schools will increasingly come to manage themselves. This implies a profound change in the culture and practice of schools. The extent to which schools are able to make the necessary changes will depend largely on the nature and quality of their internal management.

> **It is the purpose of education management development to build the capacity of the system, beginning at the school level, to effect transformation in terms of improving the quality of teaching and learning.**

Schools vary enormously: most farm schools are under-resourced and isolated; some township schools are traumatised and dysfunctional; many rural schools are very poor and yet there are some which perform well; and many of the suburban schools, formerly known as 'Model C' schools, are extremely well-resourced. Despite their very different conditions and levels of resourcing, all these schools will have to accept responsibility for developing the capacity to manage themselves. This responsibility is likely to rest heavily on school principals, their management teams, and the governing bodies which the Schools Act envisages.

To achieve effective self-mamangement, schools will need assistance and continuing support. This will have to come from a range of quarters, but primarily from all the other levels of the education system. The clear implication here is that staff in all parts of the education system will have to become responsible for providing the assistance and support required by schools to improve the quality of teaching and learning. Departmental staff may themselves require assistance to reinterpret their roles and functions in the light of these new developments.

In improving the quality of teaching and learning, education management must be more *supportive* than *directive* of the change process. This means reconceptualising first, the management of schools, and second, the ways in which other bodies in the overall education system relate to schools. Taken together, this means a whole new way of doing business.

Change is likely to be a continuing process and education management development needs to pay attention to the meaning and process of educational change. Since

organisations never remain static, education management development is about developing the capacity to manage the change process – because managing people is managing change. Both from the Task Team's own experience and the lessons learned from abroad, we know that you cannot mandate change to occur. Passing a law will not, by itself, ensure that change will occur.

Furthermore, individual schools may become highly innovative for short periods of time, but may not sustain innovation without support. It is therefore very important to examine the role of other organisations in the education system and how they support or detract from the efforts of schools to change towards improved quality of teaching and learning. This is especially true in the South African context, when so much change is occurring at every level of the system, and where the concept of the 'self-managing' school is very new.

Achieving self-management

At the heart of the policy and legislative initiatives is a process of decentralising decision making about the allocation of resources to school level, and a significant process of democratisation in the ways in which schools are governed and managed. These processes are closely related to a trend towards institutional autonomy which is occurring in other parts of the world. In these countries the move to school self-management is based on the understanding that decisions should be made by those who best understand the needs of students and the local community. Studies have shown that self-management can lead to greatly improved school effectiveness.

However, the move toward self-management in itself offers no guarantee of positive change. Real transformation will depend upon the nature and quality of internal management. Self-management must be accompanied by an internal devolution of power within the school and in transformational leadership.

How then can schools develop the capacity to attain these ambitious goals? The new approach to education management development depends on the following elements: planning according to a value-driven mission, managing through participation and collaboration, developing the school as a learning organisation, and drawing on other levels of the system for support.

A value-driven mission

The approach we are advocating emphasises that everything is driven by the values and mission of the school and that these are developed and owned by more than just the principal, or some outside authority. A true culture of teaching and learning, as well as a supportive management culture can only thrive in a school where the major stakeholders feel ownership of the school's mission and ethos.

However, it is insufficient merely to adopt a formal mission statement. The mission

statement is only useful to the extent that it provides a visible symbol of what the teachers, parents and students in the school *really* believe in. The values that underpin the mission of the school shape the notion of quality for that school, but do not by themselves achieve that quality. Only by actively involving all members of the school community in the realisation of the mission can one hope to generate the kind of commitment necessary to foster continuous school improvement.

Participation and collaboration

The approach to education management which we propose is an integrative and collaborative one: collaborative in that it involves all staff and stakeholders, and integrative in so far as it informs all management processes and outcomes in an organisational setting. Decisions related to concerns such as student learning, resource management, and staff management and development, derive from premises founded on common, agreed principles. In this approach, management is shifted from being an expedient response towards being a value-driven approach, founded upon consent and consensus. It links goal setting, policy making, planning, budgeting and evaluation at all levels of the school.

Planning becomes the prime responsibility of senior staff and community representatives, translating school policies into action through shorter term development plans. These create the opportunity for negotiating immediate targets for action and provide guidelines for the optimal effective working of individuals.

A supportive management culture can only thrive where the major stakeholders feel ownership of the school's mission and ethos. This will depend on clear hands-on support from the education departments.
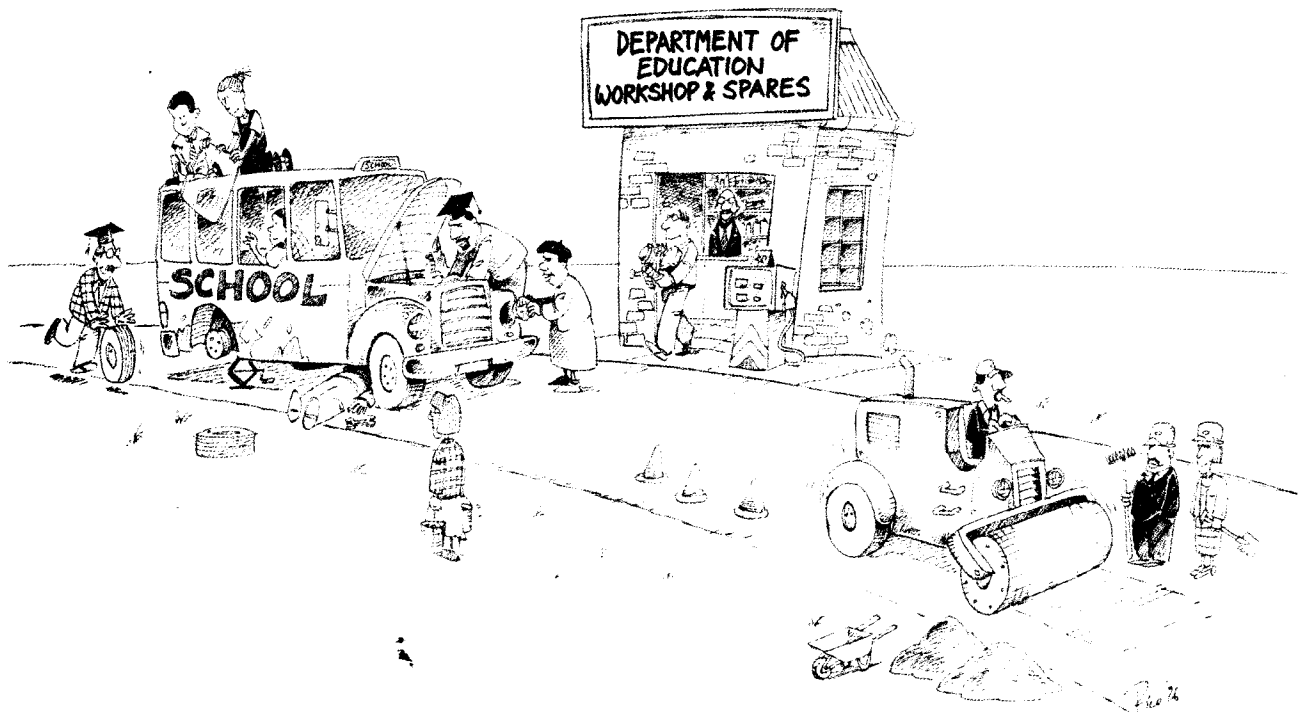
Because the vision is translated ultimately into individual action, effectiveness can be evaluated by matching actual achievement against stated intention.

Schools as learning organisations

Learning organisations treat change as an ongoing feature of their existence. They make change part of their organisational ethos and support individual and collective learning as part of their mission. Managers need a wide variety of competencies to carry out their responsibilities and the learning organisation provides the organisational context in which these competencies can be developed.

The learning organisation develops the capacity to learn and reflect, and the capacity to innovate. It uses these competencies to mobilise and use resources efficiently and to achieve the larger task of managing the changing environment inside and outside the school so as to improve the quality of teaching and learning. Management development thus combines education, training and support in the context of organisational development, staff development and curriculum development with the aim of improving the quality of teaching and learning.

> —— 66 ——
>
> It is ironic that although schools are organisations devoted to learning, they are generally not learning organisations.
>
> —— 99 ——

Drawing on other levels for support

We have stressed that schools must accept prime responsibility for developing the capacity to manage themselves, and the capacity of those involved in management. This responsibility rests heavily on the shoulders of principals and school governing bodies who will look to other parts of the education system for support.

Although we understand the particular short-term needs for capacity building for new governing bodies, we would like to sound a note of caution for the future. We believe that it is preferable that initiatives for the preparation of school governors should not be separated from broader individual and organisational development initiatives. In the approach to school-based management which we are advocating, school governors are integral partners in the process.

The assistance and continued support which schools will require should come from provincial, regional and district education departments. These departments will have a major task in helping schools adopt the new approach to management, in providing support and in mobilising other sources of support. In our view, local departments should have a clear policy statement related to a broad understanding of management and management development, which is understood by all. Furthermore, we believe that it is vitally important for local departments, as a matter of urgency, to develop teams of support staff with sufficient expertise and resources to offer good management support to schools. They also need to ensure that schools have access to reliable management information systems.

Although we have focused on the central responsibility of schools and the support

role of local departments, we are aware that in every province there are many other potential sources of support. These include tertiary institutions, non-governmental organisations focusing on education management development, private sector organisations and professional associations. We believe that these organisations and institutions are both able and willing to be involved as providers and supporters.

We strongly advocate initiatives to establish partnerships between schools, local education departments and other locally-based sources of support and expertise. In our work, we have assembled a weight of evidence which demonstrates that such partnerships can be valuable and effective.

Shifting the focus from the old to the new approach

The approach to education management which we propose is appropriate for all levels of management in the education system. It is an approach which combines individual performance and development with organisational development and, if successfully adopted, provides the means to develop in schools the capacity to manage change effectively in pursuit of their ultimate purpose.

However, we are equally aware that what we are proposing represents a radical culture shift for schools and their established ways of working. As we have attempted to show in Chapter Two, the emphasis in schools is currently on short-term tasks; there exists what we might call a culture of dependency, in which strategic decisions are expected to be taken outside the school. Clearly, most schools presently have only a limited awareness of the potential for planning which could be done at the school level, and they generally lack an understanding about the skills required.

Resistance is the most common reaction to change of this nature, so it is essential that education managers are aware of the factors leading to resistance and how to manage it. Resistance to change can manifest itself in many ways; from the slow processing of salary cheques to the simple refusal to work in different ways.

Resistance to change flourishes where there is poor communication, little or no active participation and involvement in decisions and where tensions are allowed to simmer unchecked. To overcome such resistance, it is necessary that there be open lines of communication, participation and involvement of all stakeholders, and an atmosphere of facilitation, support, negotiation and agreement.

The need to promote and encourage an acceptance of a new approach, and to enable school personnel to acquire the necessary skills, will inform our suggestions around education management development, to which we shall turn shortly.

Develop individuals or schools as a whole?

When approaches to the management of education are essentially authoritarian, non-consultative and non-participatory, as has been and still is the case in our country, management development tends to focus predominantly on enhancing the skills and competence of key individuals in the management hierarchy, so that they may carry out their line functions efficiently. However, it seems to us that, under conditions of decentralisation and a significant shift towards school-based management, it is inadequate simply to focus on individuals.

The implications of decentralised management in the education system suggest a broader and more inclusive understanding of education management development. This is why we have said in Chapter One that we are committed to the view that South Africa's strategy for education management development must embrace:

◆ *the development of managers:* the education, training and long-term support of managers

◆ *the development of management:* articulating and operationalising the principles of good management practice in South Africa, and

◆ *the development of organisations:* developing and sustaining effective structures, systems and procedures for improved management.

> **"**
> Education management development cannot be equated simply with a focus on school principals, school inspectors and so on.
> **"**

Of course, these elements of education management development are interrelated, and this is implied strongly in our advocacy of a participatory and holistic approach to the management of schools. The approach needs to become part of people's understanding of what it is to manage schools. There will thus be a need to interpret and integrate the approach into current understanding and practices.

In the approach we suggest, it is clear that the understanding of who should be involved in management becomes much more inclusive and this means that education management development can no longer be seen as being the preserve of the few.

The focus is on building effective schools, staffed with effective people with the common purpose of promoting effective learning. Thus, although individual competence is vitally important, such competence needs to be related to the development of effective organisations and should be developed in the context of such organisations. A close link between individual development needs and organisational development needs must therefore be established.

In building the competencies of individual managers, we believe that what is required is a shift in emphasis from 'training' the individual towards support for individual development within the context of organisational development. In these terms, education management development comes to be seen as a process whereby the achievement of organisational goals and the meeting of individual development needs become harmonised. Management development is placed within the context of whole-

school management and becomes an integral part of the day-to-day management of schools.

Implications for implementation

This shift in the approach to education management development has implications for education management development activities, the role of schools and the role of education departments.

In respect of education management development activities, we suggest that less emphasis should be placed on off-site, menu-driven, knowledge and skills-focused formal courses of training and development, and more attention should be given to the development of programmes and materials which are related to performance enhancement in the school context. These should reflect 'real' needs, and be sufficiently flexible for use in a variety of contexts, individually or collectively. We are not denying the value of externally provided courses and programmes, so long as they reflect real rather than assumed needs and provide an opportunity to link knowledge and understanding to application. These issues are explored in more detail in Chapter Four.

What we have suggested above represents a broad view of our recommended approach to education management development. We are fully aware that that refocusing the approach to management and the process of management development cannot happen overnight. It represents a vision of what we think is desirable and worth aiming for if South Africa is to succeed in giving substance to the vision and principles of our new education policy.

— Chapter Four —

AN EMERGING FRAMEWORK FOR EDUCATION MANAGEMENT DEVELOPMENT: GUIDELINES FOR CHANGE

This chapter outlines the key components of an

emerging framework for education management

development which the Task Team proposes as a means

of changing education management practice at all levels.

The new approach to education management and education management development which the Task Team is recommending directly reflects the shift towards democratic governance outlined in recent education policy papers and legislation. If this approach is to be realised, we cannot continue 'business as usual'.

Within the next twelve months, decision making in education will be devolved to many new sites in schools and districts, and through provincial and national levels. Despite their variety, governance processes will need to be coherent and integrated; they must balance the need for greater local participation and consultation on the one hand, with coherence and accountability on the other. In other words, they will need to be managed. This means that the development of management capacity cannot continue to be treated simply as yet another item on the extensive list of problems confronting education departments in South Africa.

A new generation of school managers will have to develop effective relationships with both their school governing bodies and departmental officials. District officials and administrators will have to learn how to relate to governors and school principals in new ways which focus on empowering schools to improve the quality of teaching and learning. School governors will have to learn how best to take responsibility for making decisions that affect their schools, and how to interact with the school management team in ways which offer support and guidance, balanced by thoughtful direction and control.

The task of instilling these new attitudes, skills, knowledge and understanding is at the heart of the challenge we face in transforming governance and management. The task may be daunting, but it is not impossible. The new policy framework for decentralised decision making is now embedded in the South African Schools Act, and the pace of change to more democratic governance will be determined by progress in building new competencies at all levels.

The way forward requires creative strategies for turning the new approach to education management and management development into effective action. Our framework can best be understood as a guiding instrument – and not a blueprint – for change. It is intended to focus our attention on the principal ingredients for systematic capacity building. In other words, the Task Team is not saying that the Minister, the departments of education, district officials or school management teams must do this or that. Rather, we are recommending that different people in the system take action on these components as they see fit, with a view to building capacity in the institutions in which they work.

STRATEGIC DIRECTION
- improved access & quality
- awareness
- leadership issues
- governance & management
- research & development

ORGANISATIONAL STRUCTURES & SYSTEMS
- delivery of quality education
- organisational structures
- provincial centres for EMD
- management systems
- information systems
- quality assurance systems

A HOLISTIC APPROACH TO EDUCATION MANAGEMENT DEVELOPMENT

contextual relevance • cooperation and coordination • coherence • creativity • coverage • consensus and community • commitment • confidence

HUMAN RESOURCES
- empowering people
- developing competencies
- recognising competence
- training & support techniques

NETWORKING, PARTNERSHIPS & COMMUNICATION
- creating & supporting a web
- vibrant NGO community
- enabling partnerships
- communication

INFRASTRUCTURAL & OTHER RESOURCES
- material & physical resources
- improving allocation & use of resources
- accessing additional resources
- materials collection and development

Guiding strategic principles

The Task Team's recommendations are informed by the following practical principles, drawn from our consultations and international experience. We believe that to be effective, education management development strategies for South Africa must aim for the following:

◆ *consensus and commitment*: they must be based on shared purposes, goals and principles, and a common understanding of what constitutes good management and leadership practice

◆ *confidence*: they must be based on a foundation of trust in education cadres, their capacity for reflection, and their potential for professional self-motivation

◆ *contextual relevance*: they must take account of historical and continuing disparities among schools, institutions and governing bodies with regard to provision, organisation, skills, resources and commitment

◆ *cooperation and coordination*: they must be based on new working relationships within the education community; on active, focused partnerships inspired by commonly-held goals

◆ *coherence*: they must provide possibilities for improving both the skills of managers and the performance of the education service, by integrating the needs of individuals with the needs of the system

◆ *creativity*: they must make the best use of all available human, material and financial resources, and a variety of training and support techniques, and

◆ *coverage*: they must be capable of reaching very large numbers of those who are now responsible for managing and leading educational transformation in all parts of South Africa.

Guidelines for education management development

Participants at Task Team colloquia suggested that the primary purpose of education management is to 'create an environment for effective teaching and learning' - that is, to improve performance in the education service according to three criteria:

◆ *effectiveness*: achieving the objectives of the school, institution or education system

◆ *efficiency*: improving performance at equivalent or lower cost; using resources to best effect

◆ *relevance*: sustaining the ability to learn and adapt.

How then can we begin to build capacity to achieve improvements in the quality of education we provide?

Throughout our consultations, the Task Team has consistently stressed that education management development is not simply about providing training for individuals.

Rather it includes the processes whereby people agree on the values which underpin the vision and mission of every education institution and the performance of individuals in them, as well as the education systems and structures, policies and procedures within which people are able to work effectively.

The Task Team recognises the need to promote a common understanding of education management development, and to foster a systematic approach to building capacity for improved education performance. It has not been possible during our brief term to design a comprehensive, coherent framework for this process. Nevertheless, on the basis of our research and consultations, we are able to sketch out some of the principal components of the guidelines for change. In keeping with the theme of this report – *changing management to manage change in education* – we propose a dynamic framework which will evolve and be adapted for use in a variety of ways, according to need.

We outline here the five major components of the framework, and in the remainder of the chapter elaborate each. Chapters Five and Six suggest practical steps which can be taken to achieve these goals.

An overview of the major components

The central thrust of the framework is capacity building – developing the ability of institutions and individuals to perform effectively and consistently. It consists of five key components:

♦ *strategic direction*: building the capacity to set the course for schools, institutions, and various levels of the education service, within the context of agreed values and principles which will guide them, and keep them on course

♦ *organisational structures and systems*: building the capacity to develop and deliver quality education services through effective structures and procedures

♦ *human resources*: developing people at all levels of the education service, whether they are managerial, technical, professional or support staff

♦ *infrastructural and other resources*: developing the basic infrastructure for decision making, and providing adequate technical, financial and material back-up

♦ *networking, partnerships and communication*: linking institutions, people, resources and interest groups inside and outside South Africa in a variety of practical, focused ways, and improving levels of communication.

Taken together, these components constitute a holistic framework for changing education management practice in South Africa, and ultimately for improving the quality of teaching and learning in our schools. Although an individual organisation might feel disposed to concentrate on one component, it is important to recognise that the strategy cannot be fully effective if only one of its components is implemented. On the other hand, we are sure that our framework is not yet complete, and that

other components will need to be defined if our approach to education management development is to be coherent and comprehensive.

In the remainder of this chapter, we suggest ways of moving forward on the basis of the framework.

Component 1: Strategic direction

Setting the course for schools, institutions, and various levels of the education service, within the context of agreed values and principles which will guide them – and keeping them on course – will require capacity to be built in the realm of organisational values and ethos, policy making and strategic planning, and decentralised decision making. Strategic direction must reflect and promote both coherence and diversity within the context of a school-based focus on teaching and learning.

Improved access and quality. If the purpose of our education system is to provide good education for all learners, and in so doing to redress historical imbalances in provision, then we must seek to achieve higher levels of school effectiveness, efficiency and relevance. We have considered the school-centred approach to education in Chapter Three, and believe that the first step in developing capacity to manage our schools better is to understand and promote this vision of schooling.

At the heart of South Africa's new education vision is the intent to democratise the education system and devolve decision making to schools. This principle has direct implications for every individual and institution in the education service. If it is to be implemented, the principle must be fully understood and accepted: this is the

Strategic direction must set the course for schools, institutions and various levels of the education service in order to improve learning and teaching.

baseline for change. It will not be sufficient simply to publish policy and promulgate new legislation. Rather, active steps will need to be taken to ensure that everyone is familiar with the content of the new policy, is comfortable with the new vision, and receives sufficient guidance and support in understanding the new initiatives.

Leaders at all levels of the system will need to inform people in the school community about the new democratic vision for education, reaching everyone from the newly appointed school governor to the most senior official.

Building awareness of education management development as the foundation of transformation. The Task Team is concerned that the interconnectedness of management development on one hand and transformation on the other has not generally been recognised. We are convinced that management development provides the basic foundation for change, that it is an absolute prerequisite for succesfully implementing the new education policies. Clear messages to this effect need to be sent to the system and it is vital that the Minister of Education and his provincial colleagues commit themselves to this both in principle and in practice.

It is equally important that all education professionals make a similar commitment to the new vision for education management, and the new approach to education management development. Teacher unions and professional associations, the South African Council of Educators, teachers in universities, colleges and technikons, and specialists in the non-governmental and private sectors must work together to create conditions conducive to the new approach. That means making the concepts of school performance, school quality, school effectiveness, school improvement, whole school development, and school-based management, planning and in-service training standard items in the vocabulary of education.

Who is to provide leadership? In our new dispensation, strategic direction will come from many points within the education system. One can expect leadership in this regard not only from the national Ministry and Department of Education, the provincial Members of the Executive Committee and their departments of education, but also from schools and their governing bodies, and their partners in tertiary institutions, non-governmental organisations and professional associations.

Decentralised leadership will be both formal and informal. Customarily, formal leadership is exercised by people in positions of authority: the chair of a school governing body, a district manager, or a provincial Member of the Executive Committee, for example. More and more, informal leadership will be exercised by anyone in the education community who, by virtue of their skills or resources, is able to exercise influence on the conduct of others. It is not always the person in authority who has most influence over decision making and practice.

This means in practice that all leaders will need to spend considerable time developing consensus about strategic directions in education: those which should be common across the country (or the province or district or school), and those which should

> There is no consensus about what constitutes good management, and as yet little explicit consideration of the values, ethos and style which should characterise management in education; similarly there are few explicit statements with regard to vision and goals for education management development.
>
> *Provincial Education Management Development Strategies. First Interim Statement and Working Papers, July 1996.*

evolve differently within different contexts. On the basis of broad consultation, education departments will need to develop strategies and policies for promoting education transformation, supported by effective management development interventions.

Governance and management. The South African Schools Act has just been adopted to guide our governance transformation. It requires that members of the community, senior management teams in schools, students, teachers, non-teaching staff and parents are trained for both strategic planning and management, and the management of school pedagogy. Governing bodies will, among other things, be expected to articulate the mission and vision for the school, monitor its performance, and hold staff accountable. They will help to select staff, manage finances and physical resources, attempt to bridge the gap between the school and its community, and be responsible for conflict management and resolution. This is a tall order by any standard.

It would be wrong to build the capacity of governing bodies in isolation. Governors work with principals and their senior staff – the school management team – and they are in turn supported and advised by district officials. The competencies – the skills, knowledge, understanding and attitudes – of all are inextricably interconnected and their needs must be addressed simultaneously. The Task Team's provincial audits have highlighted the uphill task ahead in clarifying the roles and responsibilities of various officials in the decentralised system, and providing appropriate training opportunities for everyone in need. They have focused our attention too on continuing discrimination against women in education management, corrupt appointment practices, the appalling conditions under which teachers in many of our schools work, and the consequent low motivation and morale among both teachers and their students. We are certain that establishing and training school governing bodies must take place within the context of improving education management across a wide spectrum of concern.

Research and development. Research and development is of overarching importance in setting our education course, one of the key blocks in our strategic realignment.

Research and development can be used to prop up existing norms and structures – or to forge new ones. An agreed and prioritised research and development agenda is particularly important if our education system is to be reflective, if it is to become an interconnected set of learning organisations.

We need to agree on those research topics which will most strongly support policy and strategy formulation, and better management practice. A number of immediate issues derive from the imperatives of transformation. They include women in management; the legal and practical problems of remote rural and farm schools; aspects of labour relations policy and practice; financial and legal frameworks for teacher management and support; organisational development and transformation; and matters related to validation, accreditation, certification, standards and norms.

> **"**
> Managers at all levels must be familiar with the implications of new policy and legislation for management through public discussion about the new approach to management, and be able to understand what it means to manage under democratic, fully participative conditions.
> **"**

Furthermore, educators are clearly stuggling to understand the significance of diverse models in education, the new vocabulary set out above, and new possibilities for taking action. Disparate professional communities are trying to make sense of this almost overwhelming diversity through pilot projects, research programmes and targeted interventions. Practitioners who must quickly make very complex decisions about education practice are also under direct pressure from ideas emanating from the international community. It is essential that in the field of education management development there is some way of coming to grips with this lavish menu of new concepts, and of understanding their potential for South Africa.

Component 2: Organisational structures and systems

To provide education of as high a standard as possible, we must build the capacity of organisations and institutions to structure themselves appropriately, to design and set in place effective patterns of work, administrative processes and procedures at all levels, to plan and implement their objectives, and to set up education management information and quality assurance systems.

The Task Team's concern here is with our ability not only to structure and manage administrative processes which impinge so directly on the welfare and motivation of teachers, but also to develop and administer the pedagogical process.

Delivering quality education. Managing pedagogical – as opposed to administrative – services involves the ability to plan, implement and monitor the delivery of these services to each school. This should be the core concern of the education system at every level. As obvious as this may sound, this perspective is often the exception rather than the rule. Too frequently, the 'management' half of 'education management' becomes detached from the educational half, as if management had some independent life of its own.

A recent study in Gauteng (Chisholm and Vally, *The Culture of Teaching and Learning in Gauteng Schools*, 1996) considered various strategies for dealing with school infrastructure (buildings, facilities and resources); leadership, management and administration; relationships between principals, teachers, students and parents; the socio-economic context; and the relationship between schools and departments of education. Most, if not all, of these issues sound suspiciously like 'management issues' and so they are. But they have been raised in the context of improving the culture of teaching and learning, and ultimately that is what education management should be about.

Organisational structures. When we talk about organisational structures, we refer to the way in which duties and responsibilities are divided among organisations and institutions in the system, and among units and individuals within each institution and organisation. We often try to draw such relationships in an organisation chart or 'organogram'.

Our new governance framework allocates duties and responsibilities among certain key 'authority nodes' of the system: the national Ministry and Department of Education, provincial Members of the Executive Committee and their departments of education, and schools and their governing bodies. Given this framework, decisions need to be taken urgently about how best to allocate work and establish day-to-day relationships among people working in various parts of the system.

The Task Team's Audit identified a number of strengths in the system on which to build, including:

◆ an existing core of trained managers, particularly in technical areas

◆ an injection of new people with enthusiasm to change the system

◆ the existence of various information systems to support management

◆ new district structures which provide for more decentralised decision making, and

◆ a wide variety of people and organisations now involved in policy development and implementation.

The Task Team does not advocate a uniform approach to organisational development: structures will evolve as needs and priorities dictate. However, whatever structure is developed, education management development concerns must be located at the heart of that structure.

A centre for education management development in each province. Each provincial department of education, as the employer of personnel and the executive authority over systems and institutions, bears primary responsibility for training and supporting its management teams, for establishing and developing school governing bodies, and for developing its management structures, systems and procedures. Each department must therefore have the means by which to develop a strategy for and adopt a policy on education management development, and to oversee the implementation of such policy. The Task Team's work with provincial education departments suggests that such capacity is nascent in all provinces, albeit in very different forms, and to varying degrees.

Education management development is unlikely ever to come into its own unless dedicated loci or centres, suitably located, staffed, mandated and resourced, are established in each province. These centres may take different forms, depending on the size and particular circumstances of each department. Some provinces may choose to restrict themselves to an education management development directorate; others might wish to establish a provincial institute for education management development, or to attach an education management development division to a provincial education development centre. Still others might prefer to maintain a small but active coordinating unit responsible for driving policy, planning and coordination, while leaving delivery largely in the hands of provider organisations, principally non-governmental organisations tertiary institutions and the private sector.

— 66 —

Education management development is unlikely ever to come into its own unless dedicated loci or centres, suitably located, staffed, mandated and resourced, are established in each province.

— 99 —

What is of cardinal importance is that the locus for leading and coordinating policy development and actual provision be established, that it be appropriately staffed and resourced, and that the commitment of the provincial leadership to its mission is demonstrated by the level of priority it enjoys.

The proposed national institute for education management development (see Chapter Five) could play an important role in supporting the development of provincial networks.

Management systems. If organisational structures constitute the 'hardware' of education management, then systems can be thought of as its 'software'. These systems include regulations which interpret legislation and policy, financial, personnel and record-keeping procedures, planning and policy formulation, and monitoring and evaluation.

Management systems may be quite formal and detailed, or more informal and open. The key issue here is not the nature or shape of the system, but whether it supports the mission of the organisation it is designed to serve, and is consistent with its values and vision. Development of these systems can be described as the process of changing the principal features of an administration so as to establish the organisation's capacity to formulate policy goals, define strategies, and implement policy with increasing effectiveness.

Education departments need to review and improve their management systems and procedures, and take measures to ensure that appropriate regulatory and support systems are in place.

Information: the core of management systems. Management information systems are indispensable to effective management. The Education Management Information System (EMIS) now under development will make reliable and practical information available to all stakeholders, and should enable managers and school governors to make informed decisions.

Education management development will both feed off such an information system, and contribute substantially to enhancing its effectiveness. On the one hand for example, EMIS will assist in identifying and making sense of areas which require capacity building interventions, and in monitoring the impact of training and support, especially if efforts are made very early on to ensure that education management development information needs are incorporated into the EMIS information baseline. System-wide capacities to use information management systems must be developed in order to facilitate decision making at all levels.

Quality assurance systems. Processes for monitoring and regulating the quality of schools are essential components of every part of the education service, from the school to the Department of Education. Quality assurance systems help to develop

— 66 —

Much hard work needs to be done to ensure the development of system-wide capacity to collect, manage and use the information generated by EMIS.

— 99 —

norms and standards for governance and management, and to decide where professional training and support is needed. They constitute a means of monitoring and evaluating effectiveness, efficiency and relevance – the three cornerstones of quality – and a mechanism for feedback into the process of policy formation.

The Task Team believe that designing and putting in place mechanisms for quality assurance is critical for the transition to democratic decision making, and the new approach to education management. This is because such mechanisms create the possibility of delegating and decentralising authority throughout the system, while at the same time protecting the system's coherence and quality.

In order for quality assurance systems to operate effectively, considerable capacity building will be required at all levels of the system. A quality assurance framework will include processes for reaching agreement on the underlying principles of education management and education management development, on characteristics of good practice, and on norms and standards. Such norms and standards are likely to be developed within the context of the National Qualifications Framework, and will require more detailed policy work to be done around issues such as identifying and promoting management competencies, accrediting education management development providers, validating courses and programmes, recognising prior and experiential learning, and certifying managers or aspiring managers at various levels.

Component 3: Human Resources

Developing people, whether they are managers or professionals, technical or support staff, requires harmonising their personal interests – their skills, aspirations and learning needs – and the needs of the system in transition, and creating incentives for better performance. Special attention must be paid to redressing racial, gender and other inequalities.

People make education work. The quality of our schools and our education service depends on support staff, teachers, principals, school governors, policy makers, and administrators throughout the system. These people not only have to deal with change on a daily basis; they have to make change possible.

Empowering people. Individuals who are working in an environment which is constantly changing, require support. Managing people (ensuring that work gets done properly and on time) and developing their skills (ensuring they have opportunities to improve the quality of their work) ensures continuous improvement and positive change for everyone in the organisation and makes excellence in our schools possible.

The challenge is to provide the kind of support, skills and knowledge that will enable each individual in the education community to contribute as much as possible.

—— ❝ ——

Productive education change at its core is not the capacity to implement the latest policy, but the ability to survive the vicissitudes of planned and unplanned change while growing and developing.

Dr Chabani Manganyi, Director-General for Education, quoting Michael Fullan's Change Forces: Probing the Depths of Educational Reform, 1993.

—— ❞ ——

Effective capacity building will focus on three aspects of 'people development':

◆ *objective empowerment:* people need to perceive that appointment, promotion and upgrading procedures are rational and fairly applied; that they have access to the information they need; that leadership locates decision making at appropriate levels; and that they have sufficient physical and material resources to do the job

◆ *subjective empowerment:* people need to have a sense of 'I can do this' which originates from a feeling of self-confidence and motivation, and promotes high morale

◆ *competence:* people need to have or develop the skills, knowledge, understanding and attitudes which enable them to carry out their responsibilities effectively.

Developing appropriate competencies. In developing human resources for education, care needs to be taken to meet needs which are emerging from the new approach to education management, including an increased emphasis on relationship- and team-building skills. Participative management and decentralised decision making require educators at all levels to interact with many different people and organisations in making joint decisions and cooperating in a range of tasks. They need new interpersonal, facilitation, leadership and conflict resolution skills. In addition, skills in the analysis, communication and use of information need to be developed as an essential pre-requisite for transparent and democratic management.

We suggest that making the best use of our human resources involves:

◆ *Planning to ensure that people with the right skills and abilities are in the right place at the right time.* Planning assists us to work out what people are needed, in what positions, doing what kind of work, and when. It involves understanding the numbers and the skill profiles of people needed by an organisation, and working out the best way of obtaining them, or training them, when they are needed. Planning enables managers to identify the impact of change on people in order to develop strategies for restructuring an organisation on a continuous basis.

◆ *Employing people through fair and effective procedures, including those for recruitment, selection, promotion and deployment.* Rational appointments procedures, consistently applied, ensure the best use of the skills that are available to the system. 'Quality in selection' based on merit and equity, is essential to performance and morale.

◆ *Managing people to balance individual performance, attitudes and aspirations with the overall goals, culture and values of the organisation.* People management must focus on improving individual and team performance in such a way as to contribute to the effectiveness of teaching and learning. Managing people is not just a matter of getting people to work harder: it involves helping people to work more effectively.

> **Serious race and gender distortions in the management cadre place blacks and women managers at a significant disadvantage. Some departments could point to affirmative action policies which were starting to address the problem, while many simply referred to the need for more effective affirmative action.**
>
> *Peter Buckland and Michael Thurlow, An Audit of EMD Needs and Resources in South Africa: A Synthesis, 1996.*

◆ *Developing people* to improve the effectiveness of each individual, and of the organisation. This requires that people have opportunities for improving the skills required in their current jobs, for pursuing their career goals, and for taking up new responsibilities in an education system in transition. Today, most skills upgrading takes place through formal training and development programmes. More and more however, we anticipate that people development will involve on-the-job training and support – in schools and districts – career counselling, mentoring and self-study, distance education and peer-group work, so that the culture of learning is dispersed throughout the education community.

◆ *Working together* to foster recognition of the interdependence of everyone in the education community. Good working relationships, effective staff participation, and disciplined leadership are essential if each individual is to contribute to the attainment of our educational vision.

◆ *Equity,* that is, ensuring that we recognise the diversity within our education community. We are absolutely obliged to recognise the contribution which men and women with different skills, attitudes and cultures can make in improving education quality. We must particularly focus on developing anti-discriminatory practices with regard to race, gender and disability, and improve the way in which people deal with issues of sexual harassment, abuse and violence. We must also ensure that appropriate steps are taken, within the context of transformation, to address historical inequities and set targets for redress.

Recognising competence. One of the key issues in human resource development is how to validate training courses and trainers, and how to certificate trainees or otherwise recognise and reward improved performance. Our consultations suggest that it is necessary to set in place procedures for:

◆ identifying agreed competencies (skills, knowledge, understanding and attitudes) that characterise management at various levels, within the context of the National Qualifications Framework

◆ accrediting providers, and validating their courses or programmes, on the basis of agreed criteria, to ensure that what they offer is sound and relevant

◆ recognising accumulated experience and improved performance through promotion and rewards, and

◆ identifying competencies the candidate will be required to offer *before* appointment or selection to designated management posts.

Training and support techniques. Education management development will only be effective if there is greater creativity about the training and support techniques that are used. If we are talking about effective training, about reaching very large numbers of people – probably about 200,000 school governors to start with – and if we also recognise the need to provide long-term local support to school management teams, district officials, and other management cadres, then the designers of capacity building programmes will need to investigate the creative potential of a variety of techniques including distance education, mentoring, peer group study, cascade training, study

tours and exchanges, attachments in industry, serial workshop programmes, cluster- and school-based support and in-service training, coordinated non-governmental training and support programmes, teacher in-service centre and college outreach programmes, clusters of schools working together, and self-study. All of these need to be supported by high quality training manuals and resource handbooks, and complemented by district advisory services.

The potential of distance education has not been realised in the field of education management, and new models will need to be designed and applied in order to reach governors, school heads and district officials, and to turn their skills to best effect. The importance of keeping capacity building initiatives as close as possible to schools, or clusters of schools, cannot be over-emphasised.

Component 4: Infrastructural and other resources

Developing the basic infrastructure for decision making, and providing adequate technical, financial and other resource back-up involves appropriate working environments for students, teachers and governing bodies in particular, adequate physical and material resources, computer systems, and the allocation of funds. Best use must be made of scarce resources – allocations must result in increased capacity to perform – and historical imbalances redressed.

Capacity building requires money. But financial resources alone will not build capacity: it is *how* they are used that will ultimately determine whether the education system achieves higher levels of performance, and education departments will need to plan how funds must be applied to education management development for best effect.

Material and physical resources. Infrastructure usually refers to the basic conditions under which teaching and learning takes place, the school and classroom environment. In many schools, attention must be given to very basic needs like water and electricity. How can governing bodies be effective without access to photocopying facilities, phones or transport? In other schools, basic amenities are taken for granted, and attention will focus on the quality of the school's workplaces, equipment and fittings. Telecommunication, computer hardware and software, and other technologies that underpin modern management, are only very disparately available to school management and district teams. Provinces need to analyse current allocations of material resources, and to devise strategies for meeting the most urgent needs and reducing current disparities in provision.

Improving the allocation and use of resources. One of the most telling demonstrations of commitment – or lack thereof – to a new vision for education is in the allocation of resources, particularly in the context of budgetary restraint and reduction in the size of the public service. In order to implement the new approach to education management development, appropriate human, infrastructural and financial resources will need to be assigned to it.

In designing an overall strategic resource plan for education management development, the starting point has to be a *detailed analysis of the utilisation, cost effectiveness and efficiency of the deployment of existing resources.* While it has proved impossible for the Task Team to gather sufficient data on which to base such an analysis, it is nonetheless clear that available resources are not being used optimally. Duplication of effort, overlap of provision, the right hand proceeding in blissful ignorance of the left, a lack of coordinated and targeted action – these are all common features of our current capacity building efforts. Concerted implementable strategies will help here. Better targeting of resources will be encouraged by shifting discretion to allocate resources as close as possible to the point of implementation.

At the moment, under-provision is exacerbated by the fact that the bulk of financial resources for education management development are allocated to universities and technikons in support of pre-service and post-graduate academic training for professionals. The flow of funds to tertiary institutions will need to be targeted much more precisely, and the funding formula adapted in order to reward such institutions for engaging in professional management development work.

Policy work will indicate whether there is also merit in targeting programme funds so as to redress current disparities in upgrading opportunities, and creating incentives

Redirecting the flow of resources for education management development will be necessary to address current disparities in efforts to build capacity.

> ❝
>
> In contexts where schooling has collapsed, the condition of school buildings and facilities makes an incalculable difference to the climate of learning and teaching in a school. The morale of school-goers and teachers alike is deeply affected by the physical environment.
>
> *L Chisholm and S Valley, The Culture of Learning and Teaching in Gauteng Schools. EPU, University of the Witwatersrand, 1996.*
>
> ❞

– financial rewards, amended appointments and promotions procedures – which will encourage self-motivated and self-financed upgrading.

Accessing additional resources. In addition to improving the way existing resources are used, a strong imperative exists for *allocating additional resources* to education management development. In terms of the scale and scope of the needs outlined in Chapter Two, current development opportunities fall far short of meeting our needs. Additional budgetary provision is required, additional posts, and additional infrastructural and other resources.

The international community has signalled its willingness to support education management development activities. Bilateral agencies representing Britain, Canada, Denmark, France, Sweden, and the United States of America, and multilateral agencies including the Commonwealth Secretariat, the European Union, UNESCO (and its International Institute for Educational Planning) and UNICEF have already made commitments to management development or are negotiating support programmes.

The contributions of the international community are welcome, as long as they can be directed and focused towards agreed priorities. National and provincial strategic resourcing plans will need therefore to include a set of priorities in which the international community might be invited to invest. This will focus such resources where they are most needed, and in a way that builds the capacity of the departments or institutions they are intended to serve.

Materials collection and materials development. South Africa urgently requires a central, world-class document collection dedicated to education management. The collection could be housed at the national institute for education management development proposed in Chapter Five, but it must be complemented by reasonably comprehensive, systematic and up-to-date collections in institutes, colleges and faculties of education, each provincial administration, and in selected education resource centres.

Establishing and maintaining such a set of resource materials cannot be limited simply to collecting materials available in South Africa or from around the world. It must also involve developing our own training and resource materials. Generic materials – which can be adapted as needed for governing bodies, school management teams, district officials and others – can be prepared nationally or provincially by writing teams composed of practitioners working to a 'menu' of topics agreed with those who will benefit from the materials.

The principal purpose of such generic materials is to set an example of quality with regard to language, layout and design, content and practicality, and by such quality to gain visibility in and access to the system. Promoting materials development and distribution should be one of the highest priorities of the new approach to education management development at all levels.

Component 5: Networking, partnerships and communication

Linking institutions, people, organisations and interest groups inside and outside South Africa in a variety of practical ways, and improving communication with one another, will enable us to make effective use of the technical, financial and professional resources available to education management development, and find ways to collaborate in grappling with common problems.

A web of support and support for the web. The Task Team believes that only a strongly-woven web of vibrant networks and partnerships has the breadth and depth to nurture, drive and sustain the management of change. Schools, educational institutions, and government departments cannot 'go it alone'. Working together, and sharing information and expertise, is consistent with an open, democratic education service. Furthermore, real and systemic educational change is costly, and requires the collaboration of policy makers, researchers, administrators and – most important of all – educators, students and their parents. No one can hope to initiate significant change while working in isolation.

Building positive and practical links among members of the education community is an important step in promoting change. As the channels which will carry the message of innovation in management and governance, as the capacity builders which will design and deliver creative opportunities for professional upgrading, focused and managed partnerships must themselves be the target of significant professional support. Each education department needs to assign responsibility for leading cooperation enterprises to designated officials within or close to their education management development locus.

The Task Team recognises that just because working together is important, it does not mean it is easy to achieve. Working collaboratively has not characterised government practice in the past. Information was something to be guarded, not shared. Seeking outside assistance or advice was seen as a sign of weakness, not strength. Networking and partnerships were not part of the management agenda. The new partnership principles which underlie the Task Team's strategic proposals depend on people making available a great deal of time and energy to make them work.

A vibrant non-governmental community. South Africa's non-governmental community has had wide experience in drawing on diverse expertise to achieve its goals, and much benefit can be derived from their experience and innovation. Non-governmental organisations have expressed their concern about their role as consultants to government, about having to compete with foreign donor-funded consultants, about how their own programmes should be evaluated and by whom. At the same time, they agree that their capacity to reflect on their own situation should be complemented by a greater degree of reflection and sensitivity on the part of government, by a commitment in government to understand and decide on the role they should play, and by greater clarity either way on funding and support.

> **" "**
>
> **All groups proposed strategies for collaboration which required immediate action in terms of developing the appropriate relationships and linkages. Most favoured the idea of a professional association for education management and leadership.**
> *The Role of Tertiary Institutions in Education Management Development, August 1996.*
>
> **" "**

The Task Team anticipates that non-governmental organisations will play an increasingly direct role in education management development programmes, in partnership with training institutions, and in consortia with other non-governmental organisations, institutions and government departments. Guidelines for involving potential partners in new working relationships in education management development are urgently required.

Evolving partnerships. The process in which the Task Team has been engaged has provided a basis for a number of new working relationships. Three national colloquia stimulated the formation of provincial core teams on education management development, and encouraged intra-provincial collaboration in designing management development strategies, and sharing information and expertise inter-provincially. Bringing together representatives from tertiary institutions, non-governmental organisations and various associations provided opportunities to extend tentative working relationships or to engage in initial consultations about working together in ways which in the past could not have been imagined.

The past year has also seen the evolution of consortia of non-governmental organisations, government departments, and institutions to set education management development policy, and implement practical training programmes. Institutions are starting to create formal linkages – sharing expertise and developing course outlines and training materials, for example – with other institutions at home and abroad. An informal network of provincial officials responsible for designing and implementing management-related activities has emerged. Schools are starting to work in clusters, or through twinning arrangements so that best use can be made of scarce expertise, equipment and materials. The South African Principals Association, established in 1995, is finding its feet, and the first steps have been taken towards establishing a forum particularly for professionals in tertiary institutions who in the past have been relatively isolated.

Provincial education officials strongly recommended to the Task Team that devices are urgently needed whereby officials can share information and practical experience related to management, and set common goals with regard, for example, to national norms and standards (within the context of the National Qualifications Framework), the transformation of provincial management structures, and negotiated incentives for professional self-development.

Officials have also pointed to the potential of convening ad hoc or standing inter-provincial joint action groups which would permit provincial officials and their partners to tackle practical problems together: establishing and training governing bodies; preparing regulations and legislation; developing and producing training materials; and rationalising inspection and advisory services, for example.

Finally, new and productive international connections have been established. Inter-provincial teams have undertaken local and international study tours. Partnerships with donors have supported the commissioning of studies and have linked researchers,

and allowed for international participation in Task Team colloquia. Provincial support programmes are being planned.

It is clearly essential to build on such national and international initiatives so that working collaboratively is no longer an exception to the rule or a pilot effort, but the cornerstone of the way we do business. The Task Team has concluded that networking and other forms of collaboration are so essential to the implementation of this framework that Chapter Five is devoted to this important issue.

Communication. Finally, and as we indicated earlier, sharing information is basic to informed decision making. At every level of our education system, transparency in communication should characterise our interactions with one another. At every point at which people make decisions, they must have access to information, and so the process of decentralisation must include provision for information decentralisation.

— Chapter Five —

SUSTAINING THE NETWORKS: A NATIONAL INSTITUTE FOR EDUCATION MANAGEMENT DEVELOPMENT

This chapter provides an overview of the

---

proposed national Education Management

Development Institute.

The original Terms of Reference required the Task Team to make proposals for a national institute for education management development. In including this item the Minister was drawing on the recommendations of several previous policy documents, all of which advocated the establishment of a national institution of some kind which would provide a locus for driving the national strategy for education management development.

In its deliberations the Task Team focused firstly on the formulation of a broad national strategy for education management development, and not on an institute which would give it institutional form. Members of the Task Team did, however, visit a number of national education management development institutions in the course of their work, and commissioned a study of the lessons to be learned from the international experience of such institutes.

Key among these lessons was the need to ensure that such an institute remains a relatively small and flexible operation which is in constant contact with the changing realities of the classroom. International experience also suggests that there may be benefits in employing staff on contract or secondment so that there is a regular turnover of personnel with fresh ideas and experience from the field. It may therefore be unwise to locate such an institute within the public service, since recruiting policies would need to be highly responsive and flexible, and may preclude the appointment to senior posts of managers who are highly experienced but lack appropriate academic qualifications.

> **A national education management development institute should avoid having a large administrative infrastructure, and should use the highest standards in selecting staff.**

From the beginning the Task Team sensed that a large and powerful central education management development institute goes against the logic of the more decentralised approach to education governance which is reflected in the emerging policy framework. Other stakeholders were also quick to warn of the dangers of creating a central bureaucratic structure and hoping that it would be given the authority to manage and control education management development in the provincial education departments and the country's schools. There was even serious talk of a 'virtual institute' or network of relationships without a physical locus or staff.

In the end, however, *the Task Team concluded that a national institute of some kind is a necessary corollary of the strategy it is advocating.*

The national institute's role

The Task Team's vision for education management development might be loosely characterised as a focused, managed network; a dedicated core group of researchers, practitioners, university teachers, policy makers, representatives of government authorities, non-governmental organisations, teachers and community leaders who form a professional network supported, to some extent financed, and *sustained from a principal locus.*

The Task Team believes that such a network will allow for flexibility and quality in responding to education management development training and development needs, and for specialisation and wide distribution of responsibility for improving management in South Africa's education service.

International experience suggests however that there are few countries where this kind of approach has been tried out: what one generally finds is a mosaic of institutions which are not, or only loosely, interconnected, or the allocation of education management development responsibility to a single national institution or a collection of smaller institutes.

The Task Team proposes to follow the road less travelled: to create a centre, a heart, which will convene and help to coordinate a collaborative national network of education management development institutions, authorities and professionals, a network which will have the potential to reach every classroom, teacher and child in a way that a monolithic national education management development 'training institution' could not. The Task Team's vision of the potential nature, role and structure of such a centre, which might for now be called the *Education Management Development Institute* is elaborated here.

Developing the vision

The development of the vision and mission of the proposed institute is clearly the responsibility of the various stakeholders who will be involved in its establishment
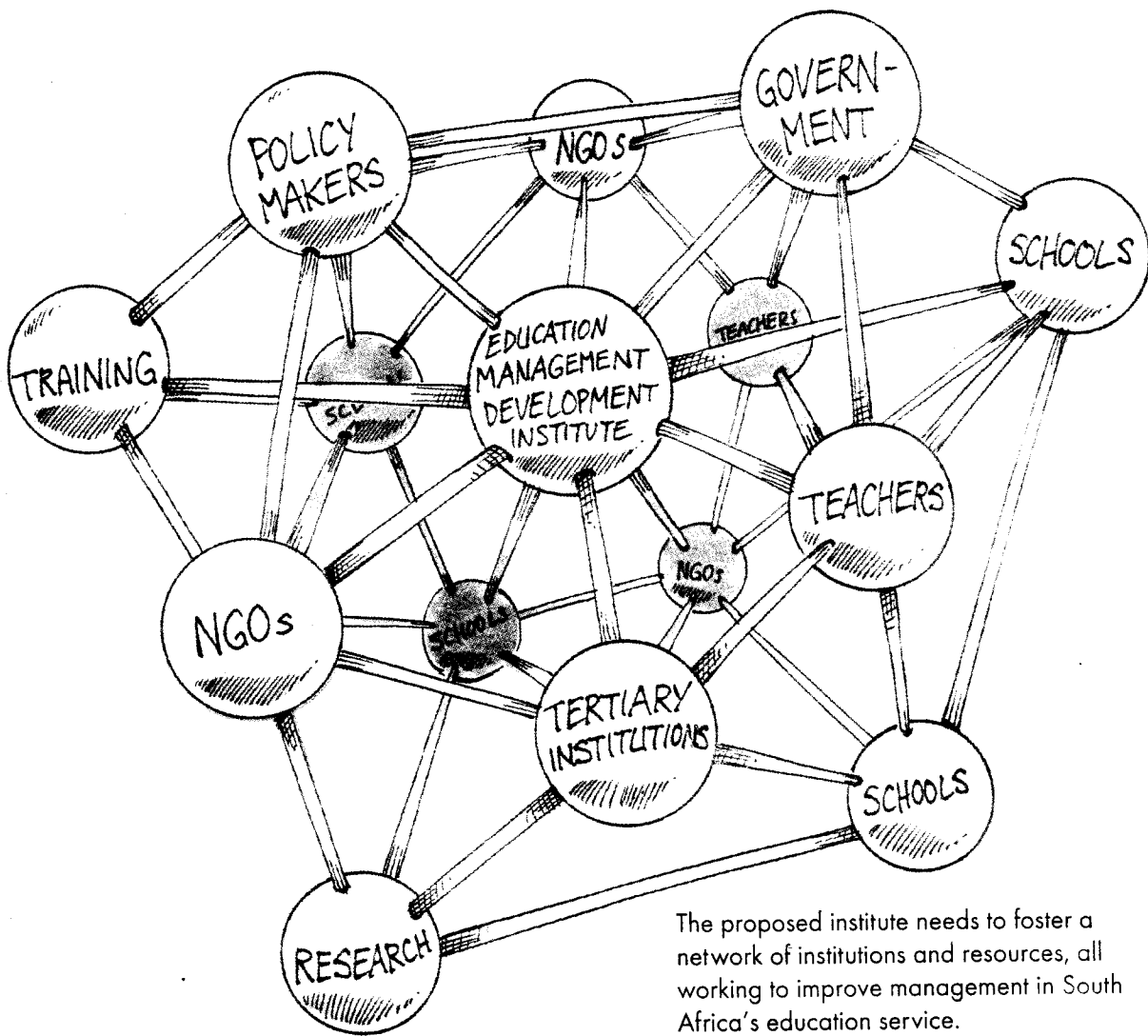
The proposed institute needs to foster a network of institutions and resources, all working to improve management in South Africa's education service.

and governance. However, the Task Team has developed its own initial vision of the kind of institute which will provide the support for the focused network which is at the heart of the proposed strategy.

The Task Team envisages a small institution consisting of not more than five or six full-time professional personnel operating as a core team to manage the work of the institute. They will be supplemented by about 20 specialists on secondment or shorter-term contracts.

The institute would operate as a node in a national network of institutions with strong linkages to the provincial education management development initiatives, and would provide a locus for intellectual leadership and new ideas and policies, for research and development in the arena. It would serve as a centre for a national collection of education management development resources and information and for education management development support materials. It would help to mobilise resources and assist provinces to negotiate relationships with potential donors to support their programmes. Finally, it would monitor the development and progress

> **"**
>
> The institute would have responsibility for supporting, maintaining and developing the network of relationships which the Task Team deems necessary for the implementation of the education management development strategy.
>
> **"**

of education management development in the country and feed information into the system to promote necessary changes.

The mission

In order to realise this vision, the institute would:

◆ *promote a new approach* to education management development and foster its implementation

◆ *raise the profile* of education management concerns in South Africa

◆ provide a locus for professional *networks* and institutional linkages

◆ define national *research* priorities in education management development, and support and participate in key research initiatives

◆ disseminate information about successful management practices *between the provinces*

◆ act as a *clearing house for information* collection and dissemination

◆ provide support for the development of high quality *education management development materials*

◆ ensure a focus on *special education management development issues* such as gender and farm/rural schools

◆ provide a nexus for the negotiation of *norms and standards* for education management development

◆ provide expert *support to service providers*

◆ facilitate selected, specialist *training* programmes

◆ help to raise and channel *resources*.

In carrying out its tasks, the institute would work collaboratively with others, and would provide leadership and support in all areas of education management development in the country.

One of the institute's first tasks would be to provide support to provinces to establish their own institutional centres for education management development. Close links with provincial education management development initiatives would be required and this would emerge as the principal education management development network for which the institute was responsible.

The institute would assist in the identification of good education management development practices, and provide access to information about such practices. It would mobilise technical support for organisational development initiatives in the

provinces, and promote the establishment of appropriate education management development structures and management systems at provincial level.

The institute would work with providers to support the development of training materials and resources. It would provide a linkage with potential national and international donors so that financial and other resources for education management development can be made optimally available. It would also facilitate the running of specialised training courses and seminars in areas where a national initiative is most appropriate, and it would strive to attract visiting scholars and specialists from around the world to visit and support the work of the institute. Finally it would maintain strong links with provincial education management development centres and the international network of education management development providers and analysts.

Autonomy and governance

The Task Team believes there is a strong case to be made for the institute to be established as a relatively autonomous – but never isolated – body. International experience suggests that institutional autonomy – in the financial, intellectual and administrative realms – is an essential precondition for developing excellence, for it allows decisions to be made by those who have to deliver the services, and know how to respond to local needs. Government agreement to a degree of autonomy for the proposed institute would signal a clear recognition of the special nature of capacity building programmes, which are very different from routine management.

The implications of institutional autonomy for staffing are clear. In general, when an institute of the kind contemplated here is part of a department of education, the rules applied for selecting staff are the same as those used in the rest of the public service. There is very little chance therefore of recruiting the right specialists. Where there is a greater degree of independence, special criteria for recruitment can be instated, along with conditions of service and status similar to those enjoyed by university staff, thus adding to the prestige and credibility of the institution. Staffing autonomy will allow the institute to call upon new talents by offering specialist short-term contracts, granting fellowships, and establishing internships, whereas a bureaucratic and rigid staffing policy would considerably reduce the flexibility of the institute and its capacity to respond to complex and rapidly changing demands.

The institute should be accountable to a board which includes representatives of national and provincial departments, unions and professional associations, allied institutions (like the South African Management Development Institute, and the human resource development wings of the public service), educational institutions, non-governmental organisations and the private sector. This body would provide a mechanism which ensures that the institute is perceived as a truly national structure, rather than purely an initiative of the Department of Education. The Task Team assumes that the Minister will follow appropriate processes of consultation to ensure commitment of all provincial departments to the establishment and ongoing governance of the proposed national institute.

> **"**
> The institute must first and foremost meet the developmental needs of departments of education. It must also achieve levels of excellence in its performance.
> **"**

Financing

The Task Team believes that the spirit of partnership and shared ownership would be best supported by a financing policy which saw the core costs of the institute supported by contributions from all ten provincial departments, perhaps on a pro rata basis related to provincial enrolment, with a fixed percentage from the Department of Education. A rough calculation indicates that this contribution would probably not amount to more than perhaps 30-50c per enrolled student per year.

The Task Team believes that it would not be appropriate to develop a detailed budget and financial plan for the proposed institute until there is greater consensus on the form it should take. However, some pointers can be provided. As indicated, the total core budget should not exceed the equivalent of 30-50c per enrolled student, which would amount on present figures to between R4m and R6m. This budget should be supplemented by a second budget for special programmes run on a national basis.

The Task Team proposes that a range of flexible options be employed in generating the revenue for these activities. The first element would be contractual agreements with the 'clients' (provincial authorities, universities or other education management development providers) which would contract the services of the institute for particular projects.

The second element could be programmes run on a cost recovery basis, whereby provinces or other participants pay an agreed fee for access to a service. The third element could be partnership programmes where the institute enters an agreement with funders, service providers or provincial authorities to focus on a specific targeted programme.

Accountability for expenditure of the core budget would be assured by the institute board which would report regularly to the Council of Education Ministers through the Minister. There is an additional accountability measure in the proposed funding approach for the programme activities in that clients would have a direct interest in ensuring service, and would not contract further services unless acceptable quality is assured.

The institute would also have start-up costs, although the Task Team is suggesting that it be located in existing premises if possible, and use existing facilities and resources wherever possible. The Task Team is aware that there are several international donors who have indicated a willingness to support the establishment of the institute, and who may be approached for the funding of initial start-up costs. However, the Task Team is adamant that the institute should not depend for its survival or core activities on continued donor funding, and should seek to use such funding as supplementary funding and not core.

The Task Team also considered a proposal that the initial commitment for core funding be made for a limited period (three to five years), and that the institute be

required to approach the Ministry for further core funding once it has demonstrated successful performance.

Staffing for excellence

Flexibility combined with stability should characterise the institute's staffing policy. That means that the institute should not be lumbered with a large and unwieldy bureaucracy, but achieve a sensible balance between:

◆ a top-class (by international standards) core staff of five or six professionals with years of experience, operating in a relatively flat management structure, who will constitute the institute's 'corporate memory' in developing consensus about good education management development practice, who will accompany the institute in its development, who are identified with and by the institute, and who provide its stable foundation, and

◆ a larger group of up to twenty professional short-term contract staff brought in to enable the institute to respond to interim priorities and short-term development needs, including staff on secondment or attachment to institute-linked programmes from schools and tertiary institutions, circuits, districts, other departmental offices, non-governmental organisations and the private sector, as required.

Core staff will be expensive to recruit, and should come from a diverse pool of professionals with strengths in research, public management, human resource development, training techniques, policy analysis, teaching and managing schools. Core staff should not be tenured: the institute must avoid the evolution of an aging and self-perpetuating bureaucracy.

The rotation of short-term staff might be seen as part of the institute's own staff development programme, for some may return later to core staff positions.

Preparation of a comprehensive long-term staff development plan must be a priority concern for the institute, for its own sake, and for the sake of its partners at provincial level, as there is a pronounced shortage of both the management and training skills South Africa needs for effective education management development leadership.

Until such a plan is in place and starting to take effect, the insights and talents of those previously marginalised and excluded from professional development opportunities must be represented on the institute's governing bodies, and young professionals provided with visiting fellowships and internships, at home and abroad.

The institute might contemplate a crash programme of capacity-building at provincial level – including mobile workshops – as a short-term priority.

> **"**
> Clear performance targets must be used which will place an obligation on the institute to continually demonstrate its effectiveness to its primary clients, the departments of education.
> **"**

Regional and international responsibilities

Wherever the institute is established, it is certain that:

◆ it must have close ties with sister institutions in the SADCC region and Commonwealth Africa in particular

◆ it must find mechanisms for cultivating a common purpose in education management development within the region and defining its own role to achieve that purpose, and

◆ linkages with individual professionals, associations of management specialists, institutes and research networks are bound to harvest a rich crop of experience, commitment, and advice.

The Task Team has noted with appreciation offers of support from both national and international institutes – among them notably UNESCO's International Institute for Educational Planning in Paris.

Location

It would be desirable for the institute to be located reasonably close to other academic centres, and in an urban area which would have infrastructure for accommodation of visitors. The Task Team visited both urban and rural-based institutes, and has opted for an urban location (to avoid isolation and ensure the ability to attract the best national and international expertise) with access to more remote facilities for 'retreats' and seminar sessions which would benefit from distance from the urban centres.

— Chapter Six —

THE WAY FORWARD: FROM RECOMMENDATIONS TO FIRST STEPS

This chapter outlines the Task Team's key

recommendations to the Minister, and suggests the

launching of an interim initiative in education

management development as one of the first steps

towards a new approach.

The new approach to education management development that the Task Team wishes to promote has been outlined in Chapter Three. In Chapters Four and Five we have offered both an emerging framework for education management development, and a relatively detailed proposal for a national institute for education management development. These chapters contain what we believe to be the heart of an overall strategy for developing capacity to manage and govern the education system and its institutions in South Africa, building on the foundations of the capacity that already exists.

The Task Team does not believe that it would be appropriate for us to offer recommendations that would amount to a blueprint for action. We believe that it is up to the Minister and his provincial colleagues, the heads of the various education departments and their officials, and the various other role-players to interpret, build on, adapt or even reject what we have offered. However, mindful of our mandate and various specific requests we have received to make practical suggestions as to the way forward, we present some such recommendations in this chapter. These recommendations are of necessity quite broad, and they are not intended to represent a comprehensive set of suggestions. They are merely intended to provide some pointers as to how to move from the conceptual framework we have developed, to more concrete steps towards implementation.

The set of recommendations is followed by our proposal for the launching of an interim initiative in education management development. This proposal arises from

the Task Team's concern that there is likely to be an inevitable delay before concrete actions can follow the tabling of our report. We believe that such an interim initiative would provide an essential bridge between the work we have started and the realisation of the broad recommendations we make, in particular, the proposal for the establishment of a national institute.

Recommendations to the Minister

The primary purpose of education management is to constantly improve the quality of teaching and learning in schools and other educational institutions. The principal purpose of education management development therefore is to improve the organisational performance of structures in the education system, primarily that of schools – school effectiveness, school efficiency and school relevance.

Education management development thus lies at the heart of the process of educational transformation, and the raising of the quality of teaching and learning. Broad strategies will be required to translate the new approach to education management and management development into effective, concrete, and attainable actions.

A whole new way of doing business: education management must be more *supportive* than *directive* of the change process. This means reconceptualising the management of schools and the ways in which other bodies relate to schools.
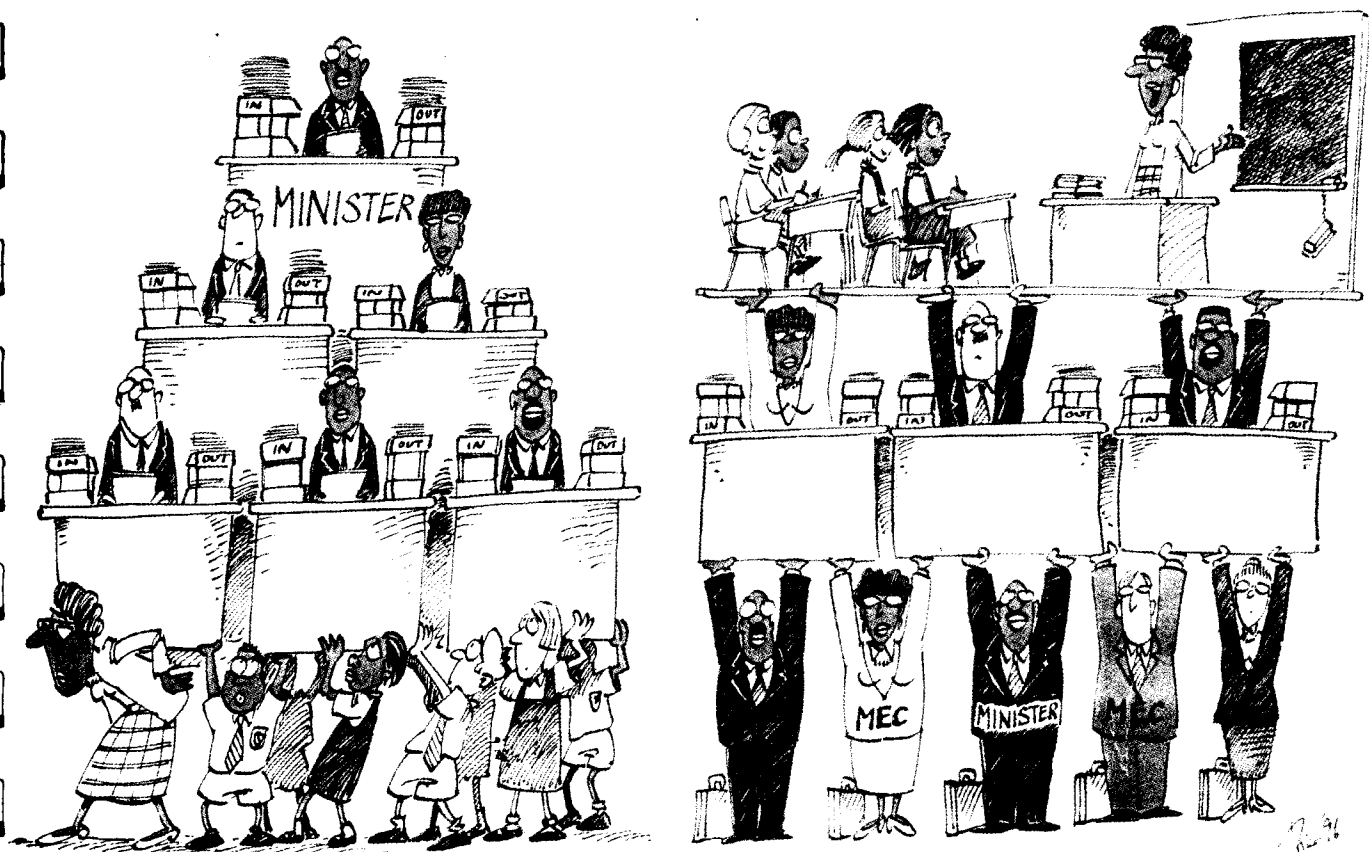
A strategic framework for education management development should include five key capacity building components:

◆ the development of strategic direction
◆ the development of organisational structures and systems
◆ human resource development
◆ the development of infrastructural and other resources, and
◆ the development of networks, partnerships and communication.

1 Strategic direction

Educators and managers in schools, district offices, provincial departments and at all other levels of the education system, must have the capacity to determine, in a collaborative way, the strategic direction of their organisations, in other words, their vision, mission and leadership development plan. They also need the capacity to implement these plans, and the ability to inspire buy-in and commitment from all relevant members of their structures. Education management development must assist schools, district and provincial departments to develop the capacity to determine strategic direction and to achieve the desired outcomes.

The national policy and legislative framework provides the context for educational development at all levels of the system. Schools, districts and provincial departments need to frame their strategic direction within this broad context. In giving content to the strategic direction, specific policies need to be formulated to provide the substance of implementation. In this regard, research and development are of overarching importance in setting the course of the education system and must be integrated into basic strategic planning and policy development processes.

Recommendation 1.1

In order for South Africa to develop systemic capacity to manage schools better, education departments, the proposed national institute and provincial centres should take concrete steps to promote understanding and support of the new vision of schooling. This is the baseline for change, and leaders at all levels of the system must assist others to understand the intention of recent policy and legislation. This understanding must start with school governing bodies, school management teams and district officials.

Recommendation 1.2

Education departments and other agencies must also promote the understanding that management development is an essential prerequisite to meaningful change in education, and must make a commitment to the new vision for education management and education management development.

> "
> *Strategic direction:*
> building the capacity to set the course for schools, institutions, and various levels of the education service, within the context of agreed values and principles which will guide them, and keep them on course.
> "

Recommendation 1.3

Based on the national vision and values for education management development, education departments should develop and articulate education management development strategies and policies specific to their various contexts.

Recommendation 1.4

Education departments, the proposed national institute, and research agencies should identify priorities for research which will support policy and strategy formation and improve management development practice. In conducting this research, the current and potential research expertise in universities and technikons, teacher training institutions, the non-governmental sector and the private sector should be harnessed and developed.

2 Organisational structures and systems

Individual managers can only perform well if the management structures within which they are working are performing effectively. This requires that great care be taken to ensure that organisational structures are not dysfunctional, that they are appropriately designed and configured, and that levels of hierarchy are appropriate to the task at hand. Regular reviews of management structures are important to ensure that the structures remain appropriate and enable managers to perform optimally in achieving agreed objectives.

In the education sector, effective management can only mean the ability to plan, deliver and monitor high quality educational services. These organisational goals can only be achieved if there are effective management systems in place. These systems include management information systems, quality assurance systems and various other administrative and operational systems. Management information and quality assurance systems in particular, are critical for the transition to democratic governance because they make possible the delegation of decision-making authority.

Education management development can play a key role in developing the capacities of organisations to ensure the appropriateness and effectiveness of their structures and systems. However, in order to do this, it is essential that structures and systems for education management development are themselves appropriately located and resourced, as integral parts of the education service.

Recommendation 2.1

Education departments should conduct critical reviews of their organisational structures, both as these apply to the system and to schools, and take the appropriate steps to remedy problems as and when they are identified.

> *Organisational structures and systems:* building the capacity to develop and deliver quality education services through effective structures and procedures.

Recommendation 2.2

Education departments should review and improve their management systems, including their regulations, policies and procedures, and take such measures as will ensure that adequate support frameworks exists.

Recommendation 2.3

Education departments should develop system-wide capacity to set up and manage user-friendly information systems and workable quality assurance systems which support education management development.

Recommendation 2.4

Notwithstanding the establishment of a national institute, each department of education should establish its own dedicated locus for education management development, appropriately situated and resourced, able to lead and coordinate policy development and capacity building in education management.

3   Human Resources

It is people who make organisations and structures work. Education quality and the process of change and redress therefore depends on the competencies of everyone in the education service. People who work in an environment which is constantly changing need support, especially in the development of their management competencies (attitudes, abilities, knowledge and understanding). Managing and developing people appropriately can facilitate continuous improvement in any organisation.

The major challenge confronting us is to build capacity to enable everyone associated with education to do their best. In so doing, we have to be mindful of, and take the appropriate steps to address all forms of discrimination, for example on the basis of race, gender, religion, geography, and sexual orientation. Mindful of the over-emphasis on the development of individuals in past human resource development policies, care needs to be taken to balance the aspirations of the individual against the needs of the organisation in the achievement of its objectives.

> ❝
> *Human resources:* developing people at all levels of the education service, whether they are managerial, technical, professional or support staff.
> ❞

Recommendation 3.1

Education departments, together with providers of training and support programmes should take the necessary steps to ensure that these training and support programmes are designed to develop the new competencies required in terms of the new approach to education management.

Recommendation 3.2

Education departments, assisted by the proposed national institute, should undertake detailed policy work to define competencies in management, to regulate the recognition and reward of improved competence, and to systematise the validation of programmes, the accreditation of providers, and the certification and/or licensing of managers.

Recommendation 3.3

Education departments should take steps to identify the most critical historical imbalances in education management and education management development (for example, lack of access to development programmes, opportunities and to management positions) and to develop strategies to address them. On the basis of a careful assessment of the extent of historical inequity, targets for redress should be set, indicating the development requirements to reach those targets.

Recommendation 3.4

Education departments and other providers should be encouraged to adopt more innovative and creative training and support techniques in order to reach larger and more diverse target groups in a coherent way. For example, better use must be made of the potential of both distance education and school- and cluster-based in-service training.

4 Infrastructural and other resources

Infrastructural and other resources: developing the basic infrastructure for decision making, and providing adequate technical, financial and material back-up.

Effective management and effective capacity development are both reliant on the availability of appropriate levels of infrastructural, financial and other related resources. The inequities in the historical allocation of these resources are particularly severe, and require urgent attention. In order to perform adequately within the context set by national policy and legislation, all school and management structures will require a basic infrastructural resource base, including telephones, office space, administrative back-up, and appropriate information technology. It is imperative that the allocation and utilisation of these resources be improved. More human, financial and physical resources need to be made available to education management development, and these need to be targeted at areas of greatest need.

Recommendation 4.1

Education departments should be encouraged to make specific budgetary commitments to education management development, and to ensure that these allocations are sufficient to give effect to their education management development plans.

Recommendation 4.2

Each education department should be required to develop an education management development resourcing plan which includes proposals for accessing resources from the private sector, from national government and local funding agencies, and from the international community.

Recommendation 4.3

Education departments should be encouraged to devolve discretion for decisions about education management development spending to levels closest to the point of implementation.

Recommendation 4.4

Education departments should target the application of resources in order to realise specific outcomes in education management development, for example, to achieve equitable redress, promote the priority training needs of the system or to create incentives for individual self-development.

Recommendation 4.5

The Department of Education should take steps to revise the funding formula for tertiary institutions in order to shift the emphasis towards more short-term professional capacity building, and to allow for their involvement in, for example, school-oriented outreach programmes, professional advice and support to schools, and materials development in response to needs.

Recommendation 4.6

Drawing on the information derived from the Audit, the Schools Register of Needs, and other sources, the education departments should develop an analysis of the most important infrastructural, technological and material needs in educational management development and devise strategies for addressing them.

Recommendation 4.7

The proposed national institute should be requested to establish a world-class documents collection dedicated to education management development, and to facilitate the establishment of complementary local resource collections.

Recommendation 4.8

Education departments should prioritise the development and distribution of high quality, accessible training and resource materials.

5 Networking, partnerships and communication

New kinds of networks, partnerships and linkages are essential catalysts for driving education management development and should constitute the foundation for the way we do management development. Achieving systemic change is a complex and costly endeavour, and requires the collaboration of everyone in the education system in promoting change. If networks and partnerships are to be important vehicles for implementing the new approach to education management development, then the capacities of such partnerships and networks will also need to be enhanced significantly. There are many new possibilities for working partnerships capable of supporting management capacity building in the education sector.

In order to cultivate the terrain within which these networks and partnerships can flourish, more openness and better public communication is essential. The inadequacy of communication, both internal to education departments, and external to the general public, and between schools and departmental management structures, was highlighted as a key problem in the Audit. It is imperative that urgent steps be taken to develop the capacities of all levels of the education system to communicate more effectively.

Recommendation 5.1

Education departments, assisted by the proposed national institute and provincial centres, should encourage, support and strengthen existing, evolving and new networks and partnerships in support of management development. Responsibility for performing these functions should be assigned to an appropriate structure within each department, and in relevant structures at all levels of the system.

Recommendation 5.2

Education departments, assisted by the proposed national institute and provincial centres should support the establishment of:

◆ inter-provincial and provincial fora to share information and practical experience with regard to matters of common interest (standards and norms, accreditation and validation, advisory support services, the transformation of management structures, for example)

◆ inter-provincial action groups for tackling problems together (establishing and training governing bodies, developing regulations and legislation, for example)

◆ intra-provincial networks of non-governmental organisations, tertiary institutions, private sector providers and officials

◆ associations of education management development professionals.

Recommendation 5.3

Education departments should support the establishment of professional partnerships between their sub-units and management development providers such as tertiary institutions, non-governmental organisations and the private sector.

Recommendation 5.4

Education departments should develop, and should encourage schools, districts and regions to develop communication strategies which promote transparency and access to information, and enhance informed decision making.

Recommendation 5.5

Education departments should be encouraged to develop policies, guidelines and enabling frameworks (legal, financial, etc) to facilitate a more active contribution from a broad range of providers, including non-governmental organisations, universities, technikons, teacher training institutions, and the private sector, to meet education management development needs in a coherent manner.

Implementing the recommendations

The recommendations above will obviously require careful consideration on the part of the Minister and his colleagues. Despite the fact that they are not intended to be comprehensive, they are nonetheless quite wide-ranging in their scope, and profound in their implications. It would not be out of place to ponder how all of this is meant to happen, and who is meant to take responsibility for ensuring that it does. As indicated in the preceding pages, the Task Team clearly expects the Ministry to play a leading role in facilitating and coordinating implementation.

We have however also made some fairly strong proposals about the role that a national institute for education management development could play in leading and supporting implementation. We believe that in exchange for a relatively small outlay of budgetary resources, such an institute could come to constitute the major resource in implementing these recommendations. The Task Team has also recommended the identification or creation of a dedicated locus for education management development in each of the nine provincial departments, and in the Department of Education. Together these units should constitute the nodal points around which a comprehensive delivery infrastructure can develop. If, in addition, the networks and partnerships that we advocate can be generated and sustained, interacting with,

and feeding into and off these nodal points, then implementation becomes not only more feasible, but also significantly less daunting fiscally.

None of these structures are likely to be established immediately. The tabling of this report is likely to be followed by an inevitable delay before the recommendations could be acted upon. First, there will be a period of public policy dialogue during which the Minister is likely to conduct further consultations with key stakeholders. Furthermore, some of the recommendations might require statutory action and/or budgetary provision before they can be implemented. For these reasons, and on the advice of provincial delegates and our Reference Group, the Task Team has proposed the launching of an interim initiative in education management development.

Proposal for an interim initiative in education management development

In order to provide for bridging activities between the work undertaken by the Task Team and the first official phase of implementing national and provincial strategies in education management development, an interim initiative should be established with a one-year mandate, extendible for six months. This should allow sufficient time for steps to be taken to establish a more permanent centre for coordinating education management development activities. Such an initiative should be mandated to provide for ongoing advocacy and awareness-raising concerning education management development, continual technical and professional support for urgently required education management development activities, forums for inter-provincial exchange, sharing and professional development, and to assist in the preliminary development of an implementation strategy.

Programmatic areas

The programmatic areas described below have been identified as the most pressing needs requiring immediate attention. The identification and response to such needs is an interactive process and will continue to involve consultation with all partners in education management development.

Through mechanisms such as inter-provincial colloquia of provincial core teams, the initiative should ensure that it responds to actual needs and dovetails with other provincial and national initiatives. In addressing these areas, the initiative would draw on existing resources in education departments, provincial service commissions, tertiary institutions, non-governmental organisations, professional organisations, the private sector, the international community and in schools themselves.

The programmatic areas to be focused on should include:

◆ human resource development
◆ organisational development
◆ building networks, partnerships and communication
◆ targeted initiatives and other capacity building needs
◆ preparations for the establishment of a national institute.

Governance, management and staffing

It is proposed that a Reference Group be established to provide advice, guidance and policy direction, approve workplans and budgets and maintain linkages between all partners. Such a Reference Group should ensure that the initiative is accountable to the Minister through the Department of Education, to provincial ministries of education and their respective departments, and that it takes account of the interests and concerns of other stakeholders. The Minister should appoint a Director who should be mandated to manage the initiative, including the appointment of additional staff on contracts, secondment, and on other occasional bases.

Finance

The principal costs of the initiative can be financed from contributions from development agencies. Sida has already indicated a willingness to roll over surplus funds, and to consider requests for additional funding. Other development agencies including CIDA, the ODA, UNICEF, and UNESCO have expressed a willingness to consider other forms of support.

Location

Since the interim initiative is proposed to have a limited life-span, it would be preferable to attach it to an existing institution, rather than set up expensive new infrastructure. Such an institution should be able to offer sufficient office space, administrative and logistical support, and allow the initiative to operate with a relatively high degree of independence. In addition, the host organisation will need to provide a fundholding service on behalf of the initiative. Once such a host origination has been identified, we propose that the interim initiative be set up with the utmost urgency.

Concluding comments

This chapter has provided an overview of the key recommendations of the Task Team to the Minister. These recommendations have been distilled from the suggestions as to a way forward developed in the preceding chapters. We have argued that many individuals and structures have a role to play in their implementation, the Ministry and the Department of Education, the provincial ministries and their respective departments, the proposed national institute and the provincial centres for education management development, and the inclusive networks and partnerships involving a wide array of partners from civil society.

This can only happen if the new vision which we hope we have helped to develop has been widely shared, and accepted by the most important stakeholders. A concerted drive aimed at publicising and advocating this new approach is crucial, otherwise these efforts will fall on stony ground. The Task Team therefore wishes to stress the need for a detailed communication strategy which should underpin the process of consulting about these recommendations, and preparing for implementation. We appeal to all those who share this vision, to start this process by discussing the contents of this report with the colleagues with whom you work.

APPENDIX A

The Task Team Mandate

The Task Team on Education Management Development was appointed by Minister SME Bengu in February 1996. It comprised eight members who worked closely with a representative Reference Group, a wide range of stakeholders and local and international consultants in a highly participative process.

Objectives of the Task Team

In appointing the Task Team, the Minister of Education set out the following objectives:

Objective 1
To make practical strategic proposals for improving education management capacity in South Africa, including proposals for institutionalising that strategy.

Objective 2
To make specific proposals for establishing a national institute for education management development in South Africa.

Objective 3
To consider matters related to resource mobilisation, coordination and management on behalf of a country-wide education management development programme.

Objective 4
To provide an interim education management support service.

Terms of reference

The mandate of the Task Team contained the following terms of reference:

- to develop a nine-month workplan and budget to cover all the tasks that arise from its objectives

- to consult with and actively involve the national and provincial departments, client groups, providers, stakeholders and the international community in the process of carrying out its brief

- on the basis of an audit of management development needs at national, provincial, district and school level, to develop a set of priorities in terms of the needs to be addressed

- to conduct an audit of current and potential capacity for the delivery of education management development activities in departments of education, tertiary institutions, non-governmental organisations and the private sector

- on the basis of an agreed set of priorities, and in cooperation with provincial departments of education, to facilitate the development and delivery of a programme of management development activities

- to examine international experience, particularly the experience of such institutions elsewhere, as well as the latest trends in the delivery of management development

- to develop a detailed plan for the establishment of a national institution, including its mandate, financing, staffing structure, governance and location, inter alia

- to prepare workplans, recruiting strategies, budgets, draft statutes or any such documentation that will be required in order to operationalise such an institution

- to disseminate information, seek cooperation, and lobby support, including financial support for the creation of such an institution

- to present regular reports to, and seek advice and guidance from the Reference Group established for that purpose

- in fulfilling the above, to conduct or commission research, engage consultants, contract out work, and utilise outside expertise as may be deemed necessary and affordable.

APPENDIX B

Reference Group

Ms A Papenfus
Placements in Education

Mr H Hendricks
National Association of Teachers Organisations of South
Africa (NAPTOSA)

Mr C Booyens
South African Council of Educators (SACE/SARO)

Professor C Cawood
Faculty of Education
University of Stellenbosch

Mr JJ Marais
Regional Chief Director
Kwazulu-Natal Education Department

Mr T Nxesi
Deputy President
South African Democratic Teachers Union (SADTU)

Mr Z Kosi
South African Council of Educators (SACE)

Mr K Mabunda
Lecturer
Technikon South Africa

Mr J Pampallis
Director
Centre for Education Policy Development, Evaluation and
Management (CEPD)

Mr A Ralphs
Education Advisor
Africa Growth Network

Mr Tom Waspe
Director
Research and Development Policy and Planning Unit
Gauteng Department of Education
Mr ADO Moloabi

Director, School Management Development Directorate
Free State Department of Education

Dr Mabu Mateme
Chief Director
Education Training Systems and Resources
Northern Province Department of Education

Mr PS Mthimunye
Mpumalanga Department of Education

Professor PC van der Westhuizen
Director, Graduate School of Education
Potchefstroom University

Mr H Franszen
Deputy Director-General
Eastern Cape Education Department

Mr C Brian Gilbert
Deputy Director-General
Western Cape Education Department

Ms Dolly Khumalo
Regional Director
Northern Cape Department of Education, Training, Arts
and Culture

Mr MB Mobeng
Parent Representative
Mpumalanga Province

Mr A Katz
Parent Representative
Northern Cape Province

Ms Pat Sullivan
Director
Management of Schools Training Programme (MSTP)

Mr Leon Liedeman
PRO, South African Principals Association (SAPA)

APPENDIX C

Schedule of
Task Team Activites

MARCH – NOVEMBER 1996

MARCH

8	Task Team first meeting
18-20	Task Team bosberaad

APRIL

9	First Reference Group meeting
12	Task Team second meeting
25-26	Task Team third meeting

MAY

10	First meeting with representatives of international development programmes in South Africa
17-22	Task Team study visit to Paris (International Institute for Educational Planning)
22-30	Task Team study visit to Canada (McGill University, Canadian International Development Agency, University of Toronto, inter alia)

JUNE

1	Commissioning internal and international studies begins
5	Task Team fourth meeting
6	Second Reference Group meeting
15	Provincial audits of needs and resources initiated
21	Advertisements in press for information on Education Management Development programmes
25	Workshop to prepare implementing agents to carry out provincial audits of needs and resources
26	Task Team fifth meeting

JULY

18-19	First National Colloquium on Education Management Development Strategies (Magaliesburg)
21-23	Task Team bosberaad
29	National Colloquium on the Role of Non-governmental Organisations in Education Management Development (Johannesburg)
31	South African commissioned studies deadline

AUGUST

5-6	National Colloquium on the Role of Tertiary Institutions in Education Management Development (Magaliesburg)
12	Deadline for completion of provincial audits
19-24	Selected Task Team members to conference of Commonwealth Council for Educational Administration, Kuala Lumpur
19	Audit synthesis (draft) complete and referred to provinces
29-30	Second National Colloquium on Education Management Development Strategies (Durban)
31	Deadline for first draft of international commissioned studies

SEPTEMBER

3	Task Team sixth meeting
4-5	Third Reference Group meeting
18-20	International Conference on Education Management Development (Wilderness)

OCTOBER

7	Task Team seventh meeting
8-9	Third National Colloquium on Education Management Development Strategies (Cape Town)
14-16	Task Team bosberaad
25	Second meeting with representatives of international development programmes in South Africa
28	Consultation with representatives of teacher organisations, teacher training colleges, student organisations, public service commissions, professional associations et al

NOVEMBER

3-5	Task Team bosberaad
11	Draft report sent to Reference Group
14	Final Reference Group meeting
15	Final Task Team meeting

APPENDIX D

Groups and Individuals Consulted

SOUTH AFRICA

DEPARTMENTS OF EDUCATION

Eastern Cape Province

Mrs Zolisa Loni
Chief Education Specialist, Human Resource
Development
Eastern Cape Department of Education

Mrs Bulelwa Mahlangeni
Assistant Chief Education Specialist, HRD Unit
Eastern Cape Department of Education

Mrs Diagracia Nozuko Ngozi
Senior Deputy Chief Education Specialist, HRD Unit
Eastern Cape Department of Education

Mr Khaya Matiso
Director, Adult Basic Education and Training
Eastern Cape Department of Education

Mr OB Magqaza
Senior Deputy Chief Education Specialist, Standard
Education
Eastern Cape Department of Education

Mr SS Maselwa
Eastern Cape Department of Education

Mr HRD Ncanywa
Teacher Education Coordinator
Eastern Cape Department of Education

Free State Province

Mr ADO Moloabi
Director, School Management Development Directorate
Free State Department of Education

Mr Dan Tsipane
School Management Developer, Bloemfontein South
District
Free State Department of Education

Mr Thabo Nthunya
School Management Developer, School Management
Development Directorate
Free State Department of Education

Mrs Khanyi Lioma
School Management Developer
Free State Department of Education

Miss MH Mokhere
Training Officer, Training and Development
Human Resources Management, Corporate Services
Free State Province

Gauteng Province

Mr Tom Waspe
Director, Research and Development Policy and Planning
Unit
Gauteng Department of Education

Mr Brian Chinsamy
Co-Cordinator, Education Management Development
and School Governance, Research and Development
Policy and Planning Unit
Gauteng Department of Education

Mr Barry Poppleton
Deputy Director, Human Resources Directorate
Gauteng Department of Education

Ms Lucky Moeketsi
Office of the Deputy Director-General

Mr Lawrence Tsipane
Assistant Coordinator, School Governance and EMD
Programme
Gauteng Department of Education

KwaZulu-Natal Province

Mr J J Marais
Regional Chief Director
KwaZulu-Natal Department of Education and Culture

Dr Michael Lotter
Acting Chief Superintendent
KwaZulu-Natal Department of Education and Culture

Dr Thandiwe Guma
Senior Deputy Chief Education Specialist, Human
Resource Development
KwaZulu-Natal Department of Education and Culture

Mr MM Moodley
Acting Director, Provisioning
Durban North Region
KwaZulu-Natal Department of Education and Culture

Mpumalanga Province

Mr CM Mashaba
Chief Director, Human Resource Development
Mpumalanga Education Department

Mr A F Ndashe
Head, Human Resource Development
Mpumalanga Education Department

Mr M Malaza
Chief Education Specialist
Mpumpalanga Education Department

Mr Tim Naidoo
Principal, Eastdene Secondary School

Ms Doris D Mashego
District Manager
Mpumalanga Education Department

Mr BM Mthembu
Head, Strategic Planning
Mpumalanga Education Department

Mr C Mashaba
Chief Director, District Services
Mpumalanga Department of Education

North West Province

Mr Gulam-Husein Mayet
Head of Department
North West Department of Education, Sport, Recreation, Arts and Culture

Mr Abe Seakamela
Director, Educator Training
North West Department of Education, Sport, Recreation, Arts and Culture

Mr I Molale
Director, Provincial Coordination
North West Department of Education, Sport, Recreation, Arts and Culture

Mr G Mompei
Chief Education Specialist, Teacher Education
North West Department of Education, Sport, Recreation, Arts and Culture

Mrs Stella B Mosimege
Senior Deputy Chief Education Specialist, Research and Training Unit
North West Province Department of Education, Sport, Recreation, Arts and Culture

Mrs M Ntebaleng Matladi
Deputy Chief Education Specialist
North West Province Department of Education, Sport, Recreation, Arts and Culture

Dr S Sithole
Deputy Director, Research Bureau/Professional Development
North West Province Department of Education, Sport, Recreation, Arts and Culture

Sydney Riekert
Education Management Information
North West Province Department of Education, Sport, Recreation, Arts and Culture

Ms Catherine Motlhabane
District Manager, Lichtenburg
North West Province Department of Education, Sport, Recreation, Arts and Culture

Mr MI Ntshabele
District Manager, Zeerust
North West Province Department of Education, Sport, Recreation, Arts and Culture

Northern Province

Dr Mabu Mateme
Chief Director, Education Training Systems and Resources
Northern Province Education Department

Mrs Mamsie Rosemary Mogadime
Project Manager, Education Resource Centre
Northern Province Education Department

Mr Phineas M Molabe
Regional Director, Southern Region
Northern Province Education Department

Mr WP Mabitsela
Regional Director, Western Region
Northern Province Education Department

Mr MS Phophi
Chief Education Specialist, Human Resource Development
Northern Province Education Department

Northern Cape Province

Dr Zodwa Dlamini
Head of Department
Northern Cape Department of Education, Training, Arts
and Culture

Ms Dolly Kumalo
Regional Director
Northern Cape Department of Education, Training, Arts
and Culture

Mr George Berends
Superintendent of Education
Northern Cape Department of Education, Arts and
Culture

Mr Ndoyisile S Miti
Superintendent of Education
Northern Cape Department of Education, Arts and
Culture

Ms Sue Dreyer
Subject Adviser
Northern Cape Department of Education, Arts and
Culture

Mr E Abrahams
Regional Director
Northern Cape Department of Education, Arts and
Culture

Western Cape Province

Mr C Brian Gilbert
Deputy Director-General
Western Cape Education Department

Mr Ashiek Manie
Director, RDP Unit
Western Cape Education Department

Mr Tim Gordon
Head, In-Service Training
Western Cape Education Department

Mr John Lyners
Regional Director
Western Cape Education Department
Bellville Region

Department of Education, Pretoria

Mr Roelf du Preez
Deputy Director-General, Human Resources and
Administration
Department of Education

Dr Trevor Coombe
Deputy Director-General,
Systems and Resources
Department of Education

Dr Sam Mataboge
Deputy Director, Human Resource Matters
Department of Education

Mr John Samuel
Transformation Unit
Department of Education

Mr Khotso De Wee
Transformation Unit
Department of Education

Ms Sebolelo Nomvete
Deputy Director, Project Funding Directorate
Department of Education

Mr Ghalib Jeppie
Director, International Relations Directorate
Department of Education

UNIVERSITIES

Mr David Gilmour
Senior Lecturer, Department of Education
University of Cape Town

Dr HL Garbharran
Department of Public Policy and Law
University of Durban Westville

Mrs Wendy Maema
Education Policy Unit
University of Fort Hare

Mr J Pampallis
Director
Centre for Education Policy Development, Evaluation and
Management (CEPD)

Ms Jenni Karlsson
Education Policy Unit
University of Natal

Professor Clive Harber
Head, Department of Education
University of Natal

Dr Eleanor Stella Kaabwe
Department of Education
University of Natal Pietermariztburg

Professor RR Brazelle
Department of Comparative Education and Education
Management
University of the Orange Free State

Professor Michael Heyns
Faculty of Education
University of the Orange Free State

Professor Philip van der Westhuizen
Director, Graduate School of Education
Potchefstroom University
Potchefstroom

Mr Johan McFarlane
Department of Didactics
University of Port Elizabeth

Dr Johan Conradie
Department of Education Management
University of Pretoria

Dr Bennie Grobler
Department of Educational Sciences
Rand Afrikaans University

Mr Hennie van der Mescht
Department of Education
Rhodes University

Prof AG Kruger
Department of Cooperative Education
and Educational Management
University of South Africa

Mr Liano Greybe
School of Public Management
Stellenbosch University

Prof Nic Prinsloo
Department of Education Policy Studies
University of Stellenbosch

Ms Therza Forster
Department of Education
Vista University, Bloemfontein

Professor Prakash Singh
Department of School Subject Education Sub-Head
Vista University, Port Elizabeth

Dr Yusuf Sayed
Department of Comparative Education
Faculty of Education
University of the Western Cape

Mr Glen Fisher
Acting Director, Education Policy Unit
University of the Western Cape

Dr Shirley Sebakwane
Department of Education
Witwatersrand University

Mr Mark Potterton
Researcher
Department of Education
University of Witwatersrand

Dr Michael Cross
Department of Education
Witwatersrand University

Professor RV Gabela
Head, Department of Educational Planning and
Administration
University of Zululand

Professor Nana Makaula
Associate Professor in Foundations, Faculty of Education
University of Transkei

Professor C Cawood
Faculty of Education
University of Stellenbosch

TECHNIKONS AND COLLEGES

Mr Basil May
Executive Director
Committee of College of Education Rectors of South
Africa (CCERSA)

Mr David Jones
Committee of College of Education Rectors of South
Africa (CCERSA)

Mr CJ White
Department of Teacher Training
Technikon Pretoria

Mr AS le Roux
Department of Teacher Training
Technikon Pretoria

Mr Vincent Landey
School of Teacher Education
Cape Technikon

Mr OM Seedat
Department of Teacher Education
M.L. Sultan Technikon

Mr Andrew Christoffels
Special Assistant to the Rector
Eastern Cape Technikon

Mr Louis Cleophas
Head of Department, Teacher Training
Peninsula Technikon

Dr BA Dobie
Head of Department of Education and Dean, Faculty of
Arts
Technikon Natal

Mr Brend Winston Jeremiah
Department of Teacher Education
Technikon Free State

Mr K Mabunda
Lecturer
Technikon South Africa

NON-GOVERNMENTAL ORGANISATIONS

Mr Z Kozi
South African Council of Educators (SACE)

Mr C de Vries
South African Council of Educators (SACE)

Mr RP van Rooyen
South African Council of Educators (SACE)

Mr C Booyens
South African Council of Educators (SACE/SARO)

Ms Jenny Glennie, Director
Ms Makano Morojele
Ms Christine Randell
South African Institute for Distance Education (SAIDE)

Ms A Papenfus
Placements in Education

Mr D J du Toit
ACCESS Learning and Tutorial College

Mrs Deborah Williams
Catholic Institute of Education

Mr A Ralphs
Education Advisor
Africa Growth Network

Mr Eric Atmore
Centre for Early Childhood Development

Mr K Nkoane, Acting Director
Mr Mareka Monyokolo, Policy Analyst
Centre for Education Policy Development, Evaluation and
Management (CEPD)

Mr Jerry Dikgale
Project Manager
Community Education Trust

Dr Monty Mohapi
Coopers and Lybrand

Dr Christa van Zyl
Researcher

Dr Jan Nieuwenhuis
Education and Training Systemic Manager
Human Sciences Research Council

Kamogelo Lekubu-Wilderson
CCRS Education Project Co-ordinator
Independent Mediation Service of South Africa

Ms Sue Davidoff, Director
Ms Brenda Sonn, Researcher
Teacher Inservice Project (TIP)
University of the Western Cape

Mrs Geraldine Nicol, Director
Phumzile Tywala
Independent Training Education Centre (ITEC)

Mr Mark Henning
National Director
Independent Schools' Council

Dr Nick Taylor
Director
Joint Education Trust

Mr Martin Prew
Education Project Manager
Link Community Development

Ms Pat Sullivan
Director
Management of Schools Training Programme (MSTP)

Dr Willem Boshoff
National Association of Teachers Organisations of South
Africa (NAPTOSA)

Mrs Beth Roberts
Training Manager
READ Educational Trust

Dr Adele Gordon
Rural Education Facilitators Project
Centre for Continuing Education
University of Witwatersrand

Dr Neil McGurk
Director
Reconstruction and Development Programme (RDP)
Culture of Learning Project

Ms Dorothy Motubatse, Assistant Programme Manager
Dr Dawn Butler, Administrator and Trainer
Reconstruction and Development Programme (RDP)
Culture of Learning Project

Mrs Alacia Kawalsky
South African Board of Jewish Education

Miss Ncedi Mkhaliphi
Siyakhula Trust

Mr SV Modise, National Director
Mr Z Senkhane, Director
Teacher Opportunity Programmes (TOPS)

TEACHERS' AND STUDENTS' ORGANISATIONS

Mrs Reena Snelling
South African Principals Association (SAPA)

Mr Leon Liedeman
PRO, South African Principals Association (SAPA)

Mr Melvyn Caroline
South African Principals Association (SAPA)

Mr Nat Bongo
South African Principals Association (SAPA)

Mr T Nxesi
Deputy President
South African Democratic Teachers Union (SADTU)

Mr Glen Abrahams
Vice President Education
South African Democratic Teachers Union (SADTU)

Mr Mfundi Sibiya
South African Democratic Teachers Union (SADTU)

Mr Dave Balt
Councillor
National Association of Teachers Organisation of South
Africa (NAPTOSA)

Mr Dorrington Matsepe
National Association of Teachers Organisation of South
Africa (NAPTOSA)

Mr Sipho Sithole
Pan Africanist Student Organisation (PASO)

Mr Patrick Makhubedu
South African Technikon Students Union (SATSU)
Pretoria Technikon

Mr David Hood
South African Technikon Students Union (SATSU)
Pretoria Technikon

INTERNATIONAL DEVELOPMENT PROGRAMMES IN SOUTH AFRICA

Mrs Helen Nordenson
First Secretary
Embassy of Sweden (Sida)

Mr Robert Benoit
Counsellor
Canadian High Commission (CIDA)

M Laurent Croset
Head of Linguistic and Education Department
Embassy of France

M Jacques-David Ebguy
Assistant to the Cultural Attache
Embassy of France

Mr Walter Haysmann
Cultural Counsellor
Embassy of Germany

Dr Kevin Lillis
Senior Education Advisor
United Kingdom Overseas Development Administration
(ODA)

Mr Habib Kkan
First Secretary, Development
United States Agency for International Development
(USAID)

Mr Jose Bright
Aurora Associates International

Dr Sibeso Luswata
Section Chief Education
United Nations Children's Fund (UNICEF)

Mr Hubert Charles, Education Advisor
Ms Ayesha Moola, Programme Assistant
United Nations Educational, Scientific and Cultural
Organisation, (UNESCO)

Mr Lars Faborg-Andersen
Danish Embassy (DANIDA)

Mr Richard Zink
Mr Roberto Rensi
European Union
Delegation of the European Commission in South Africa

OTHER

Mr Ahmed Essop
Education Consultant

Mr Henry Rust
Provincial Service Commission
Free State Province

Ms PA Ngwenya
Provincial Service Commission
Mpumalanga Province

Dr Bok Marais
Science Technology Network

Mr Isaac Garaba
New Era Personnel and Training Services

Ms P Kotecha
UNIBO

Mr MB Mobeng
Parent Representative
Mpumalanga Province

Mr A Katz
Parent Representative
Northern Cape Province

Mr Godwin Khosa
Task Team Intern
School of Public and Development Management
University of Witwatersrand

INTERNATIONAL

Bolivia

M Contreras
A Godinez
Harvard Institute for International Development
Universidad Catolica Boliviana

Botswana

Mr S Basiamang
Joint Co-ordinator
Secondary Schools Management
Development Project
Ministry of Education

Mr John Anderson
Joint Co-ordinator
Secondary Schools Management
Development Project
Ministry of Education

Dr Changu Mannathoko
Lecturer and Course Director
Gender and Development in Southern Africa
Department of Education (Foundation Studies)
University of Botswana

Canada

Teresa Beemans
Canadian International Development Agency (CIDA)

Professor Archie McKinnon
Education Consultant

Dr Charles A Barrett, Vice President, Business Research,
and President, Niagara Institute

Dr James R Nininger, President and Chief Executive
Officer

Dr Michael Bloom, Senior Research Associate, National
Business and Education

Dr Mary Ann Mclaughlin, Director, National Business
and Education Centre

Ms Carolyn Farquar
Principal Research Associate
The Conference Board of Canada and
The Niagara Institute

Dr Satya Brink
Faculty Member, Management Issues and Seminars
Canadian Centre for Management Development

Carleton Board of Education
Principal's Assessment Centre

Mr Bob Barker
International Vice President
Canadian Teachers' Federation

Canadian School Boards Association

William J Smith, Director
Office of Research on Educational Policy
McGill University

Ted Wall, Dean
Gary Anderson
Sylvia Sklar
Claudia Mitchell
Rachelle Keyserlingk
Charles Lusthaus
Duffie van Balkom
Hugh MacDonald
Helen Donahue
Arie van der Vlist
Canada-South Africa Education Sector Management
Program
McGill University

Ethne Erskine-Cullen
Coordinator
The Learning Consortium

Michael Fullan, Dean
Dennis Thiessen, Assistant Dean
Faculty of Education
University of Toronto

Ken Leithwood, Director, Centre for Leadership
Development
Carol Slater
Ontario Institute for Studies in Education

Lorna M Earl
Director of Assessment
Education Quality and Accountability Office
Scarborough Board of Education

Joanne Zywine
Brian Fleming, Team Leader, School Boards Restructuring
Project
Denese Belchetz, Education Officer, Central Ontario
Regional Office
Ministry of Education and Training
Province of Ontario

Marcela Duran, Consultant, Anti-Racism and
Ethnocultural Equity
Madge Logan, Superintendent, Special Education,
Literacy and Equity
North York Board of Education

Byron James, Associate Deputy Ministry of Education
Chair, SCHOOLNET Advisory Board
Ministry of Education
Province of New Brunswick

Malaysia

Dr Lee Ong Kim
Institut Aminuddin Baki/Education Management
Development
Ministry of Education

Dr Ibrahim Ahmed Bajunid
Director
Institut Aminuddin Baki/Education Management
Development
Ministry of Education

Mr Soon Seng Thah
Assistant Director of Research
Educational Planning and Research Division (EPRD)
Ministry of Education

Namibia

Mr Len le Roux
Deputy Director
Rossing Foundation

The Netherlands

Professor Leo Dubbeldam
Director
Centre for the Study of Education in Developing
Countries (CESO)

Dr Soehirman Patmo
Education Specialist
Centre for the Study of Education in Developing
Countries (CESO)

Sweden

Mr Ulf Linnell
Prodidacta AB

Thailand

Dr Derek Pornsima
Director, Planning Division
Office of Rajabhat
Institutes Coucil
Ministry of Education

Uganda

Mr James Luyonga Nkata
District Education Officer, Mpigi District
Ministry of Education

United Kingdom

Mr Joe Hogan
Education Consultant

Ms Nargis Rashid MBE
Governor Training Co-ordinator
Birmingham Education Department

Professor Hywell Thomas
Dr Leon Tikly
School of Education
University of Birmingham

Professor John Welton
Linet Arthur
School of Education
Oxford Brookes University

Zimbabwe

Mr Jonathan Mukurazhizha
Consultant
Ministry of Education

Ms Melania Rukanda
Chief Education Officer
Standards Control and Professional Administration
Ministry of Education

Education International

Mr Tom Bediako
Chief Coordinator
Education International/ All Africa Teachers Organisation/
Canadian
Teachers Federation and
Regional Representative and Secretary-General
All Africa Teachers Organisation

*International Institute for Educational Planning
(UNESCO)*

Jacques Hallak, Director
Gabriel Carron
Gabrielle Gottelmann-Duret
John Hall
Ta Ngoc Chau
A de Grauwe
Lars Mahlck
Francoise Caillods
F du Pouget
International Institute for Educational Planning

*Southeast Asian Ministers of Education Organisation,
Regional Centre for Educational Innovation and
Technology (SEAMEO INNOTECH)*

Dr Eligio Barsaga
Program Director for Research
Seameo Innotech

United Nations Children's Fund

Dr Sheldon Shaeffer
Regional Education Advisor
UNICEF
East Asia and Pacific Regional Office

APPENDIX E

List of Materials Produced by the Task Team[1]

MEETING REPORTS

NGO Contributions in the Field of Education Management Development. Report of a National Colloquium on Education Management Development Strategies. Task Team on EMD, July 1996.

The Role of Tertiary Institutions in Education Management Development. Report of a National Colloquium on Education Management Development Strategies. Task Team on EMD, August 1996.

Provincial Education Management Development Strategies. First Interim Statement and Working Papers. Task Team on EMD, July 1996.

Provincial Education Management Development Strategies. Second Interim Statement and Working Papers. Task Team on EMD, August 1996.

Provincial Education Management Development Strategies. Third Interim Statement and Working Papers. Task Team on EMD, October 1996.

Report of an International Conference on Education Management Development, Karos Wilderness, September 1996. Task Team on EMD, 1996.

AUDIT OF NEEDS AND PROVISION

Eastern Cape Department of Education. **An Audit Report on Education Management Development Needs in the Eastern Cape.** Report on the investigation carried out for the Department of Education by Professor Nana Makaula and associates [August 1996].

Free State Department of Education. **Education Management Development Audit.** New Era Personnel and Training Services, [August 1996].

Gauteng Department of Education. **An Audit of Management Development Needs and Provision in the Gauteng Department of Education.** Management of Schools Training Programme and Graduate School of Public and Development Management, University of Witwatersrand, August 1996.

KwaZulu-Natal Department of Education and Culture. **Audit of Education Management Development.** Report on the investigation carried out for the Department of Education and Culture by Professor RV Gabela, University of Zululand, and Ms Jenni Karlsson, Education Policy Unit, University of Natal [August 1996].

Mpumalanga Department of Education. **Education Management and Governance Development in Mpumalanga: An Audit.** Report on the investigation carried out for the Department of Education by Technikon Southern Africa, August 1996.

North West Department of Education, Sport, Recreation, Arts and Culture. **An Audit of Education Management Needs and Provision Capacity.** Report on the investigation carried out for the Department of Education by Mr Ahmed Essop and Ms Piyushi Kotecha [August 1996].

---

[1] All the materials listed in this Appendix are available, on request, from the Centre for Education Policy Development, Evaluation and Management (CEPD).
Tel: (011) 403 6131 Fax: (011) 339 3455

Northern Province Education Department. **Audit Addressing Education Management Development Needs.** Report on the investigation carried out for the Education Department by Mr Victor Modise and Mr Zeph Senkhane, Teacher Opportunity Programmes (TOPS) [August 1996].

Northern Cape Department of Arts and Culture. **An Audit of Education Management Development Needs and Provision Capacity.** Aurora Associates, August 1996.
Western Cape Education Department. **Provincial Audit on Education Management Development Needs and Capacities.** Report on the investigation carried out for the Education Department by Mr Leon Leideman, Western Cape Principals' Association, Dr Yusuf Sayed, University of the Western Cape, and Ms Sue Davidoff, Teacher Inservice Project [August 1996].

Buckland P and Thurlow, M. **An Audit of EMD Needs and Resources in South Africa: A Synthesis** [November 1996].

RESOURCE MATERIALS

Coombe, C. **Education Management Capacity in South Africa: Providing a Development Catalyst.** CEPD, 1995 (2 pp).

Mitchell, C and Smith, A. **Gender-in-Action: Reviewing Action Plans for Education Management Development.** Task Team on EMD, 1996 (3 pp).

Welton, J. **Current Provision and Potential Capacity for Delivery of Education Management Development: Some Reflections.** Task Team on EMD, 1996 (18 pp).

Notes on Farm Schools. Task Team on EMD, 1996 (4 pp).

A Note on Validation, Accreditation, Certification and Competence in Relation to Education Management Development. Task Team on EMD, 1996 (1 p).

Notes on Education Management Development. Task Team on EMD, 1996 (7 pp).

Notes on Planning and Implementing EMD Strategies. Task Team on EMD, 1996 (5 pp).

Programme Planning Toolkit. Task Team on EMD, 1996 (14 pp).

Readings in Education Management and Education Management Development. Task Team on EMD, July 1996 (26 pp).

Report on Task Team Visit to the International Institute for Educational Planning, May 1996. Task Team on EMD, 1996 (4 pp).

Visit to the International Institute for Educational Planning: Some Observations and Themes. Task Team on EMD, June 1996 (7 pp).

Tools for Strategic Development. Task Team on EMD, 1996 (7 pp).

COMMISSIONED PAPERS

South Africa

Greenstein, R. **Implications of Policy Documents for Education Management Training.** Task Team on EMD, 1996.

McLennan, A. **Education Management Development in South Africa: Trends and Frameworks.** Task Team on EMD, August 1996.

International

Arthur, L and Welton, J. **Education Management Development in England and Wales: Three Decades of Change.** Task Team on EMD, 1996.

Barsaga, E and Soon, ST. **Education Management Development in Malaysia.** Task Team on EMD, 1996.

Barsaga, E and Pornsima, D. **Education Management in Thailand.** Task Team on EMD, 1996.

Contreras, M and Godinez, A. **Education Management Development in South America.** Task Team on EMD, 1996.

Donahue, H. **Schools in South Africa.** Task Team on EMD, 1996.

Fullan, M. **Leadership and the Moral Mission of Schools in South Africa.** Task Team on EMD, 1996.

Hallak, J and Carron, G. **Building Training Institutions for Educational Management: Some Lessons from Experience.** Task Team on EMD, 1996.

Keyserlingk, R, Baker, P and Peter, P. **Lessons Learned from Partnerships and Networks in Education.** Task Team on EMD, 1996.

Leithwood, K. **Education Management Development in North America.** Task Team on EMD, 1996.

Le Roux, L. **Education Management Development in Namibia.** Task Team on EMD, 1996.

Linnel, U. **Policy and Practice of Education Management Development in Sweden.** Task Team on EMD, 1996.

Mannathoko, C and Chilisa, B. **Education Management Development in Botswana.** Task Team on EMD, 1996.

Mitchell, C and Correa, E. **Best Practices and Lessons Learned on Redressing Gender Imbalances in Education Management Development.** A review paper prepared for the Task Team on EMD. Task Team on EMD, 1996.

Mitchell, C and Correa, E. **Best Practices and Lessons Learned on Redressing Gender Imbalances in Education Management Development.** Briefing Notes for the Task Team on EMD. Task Team on EMD, 1996.

Nkata, JL. **Education Management Development in Uganda.** Task Team on EMD, 1996.

Rukanda, M and Mukurazhizha, J. **Education Management Development in Zimbabwe.** Task Team on EMD, 1996.

Shaeffer, S. **School and Community: The Key to Successful Education** Management Development. Task Team on EMD, 1996.

Smith, W. **School Performance and Change: Implications for Education Management Development.** Task Team on EMD, 1996.

Smith, W. **Universities in Support of Education Management Development: A Canadian Perspective.** Task Team on EMD, 1996.

van Velzen, BAM. Education Management in the Netherlands. Task Team on EMD, 1996.

OFFICIAL PAPERS

Director-General, Department of Education, Republic of South Africa. **Appointment of a Task Team to Investigate and Plan the Establishment of a National Institute for Education Management Development.** Memorandum to Heads of Department, January 1996 (5 pp).

Minister of Education, Ministry of Education, Republic of South Africa. **Task Team and Reference Group on Education Management Development.** Invitation by the Minister of Education, Professor SME Bengu, [January 1996] (7 pp).

Manganyi, C. **Opening Address to the International Conference on Education Management Development,** Wilderness, September 1996. (8 pp).

Task Team on Education Management Development, Department of Education, Republic of South Africa. Briefing document on the Task Team. Task Team on EMD, April 1996 (4 pp).

Task Team on Education Management Development: Workplan, March - November 1996. Task Team on EMD [1996] (20 pp).

Task Team on Education Management Development: Progress Report to HEDCOM, September 1996. Task Team on EMD, 1996 (6 pp).

Some Notes Towards a Working Paper on a National EMD Institute. Task Team on EMD, 1996 (3 pp).

Case studies of national and international experience prepared for the Task Team will be published during 1997.