

Leading to improve learning outcomes in the Jika iMfundo campaign

Allistair Witten and Kaizer Makole

Introduction

The systemic change initiative in education, called the Jika iMfundo Campaign, is being implemented in two school districts of the KwaZulu-Natal (KZN) province of South Africa. This campaign, located in the provincial and district offices and driven by a change partner, the Programme to Improve Learning Outcomes (PILO), represents an important step in the country's quest for an effective methodology that will enable it to undertake change at scale in seeking to improve the quality of public education.

This initiative is unique in the sense that it pays careful attention to the *process* of change as well the *outcomes* it seeks to achieve – with this dual focus allowing it to serve as a “policy enabler” that provides a detailed roadmap for the realisation of policy goals. The study of the work of PILO, through the implementation of the Jika iMfundo Campaign in the two districts of KZN, thus offers important insights and lessons that can deepen our understanding of what education change means in the South African context, what its effects are and the implications of these for policy and practice.

In this chapter, we explore the effects of the Jika iMfundo Campaign through the lens of leadership, focusing specifically on leadership practice at the level of the school. PILO's Theory of Change (ToC)¹ focuses on increasing curriculum coverage that will, in turn, lead to improved learning outcomes. One of the components required to achieve this goal is the role of the School Management Team² (SMT) in supporting and strengthening teaching practice in the school. We refer to this as *instructional leadership*.

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In this chapter, we will consider how instructional leadership is exercised in the school and explore some of its effects.

We begin the chapter by providing some background to the research topic. Following this, we review the literature on instructional leadership and consider its definition in the context of school improvement in South Africa. The next section will describe the research methodology that we followed to collect the data for the study. We then present the findings and discuss their importance for practice and policy in South Africa.

Background

This study on leadership is located within a broader study of systemic school improvement in South Africa. While there is a significant body of international research and literature on this subject in places like the USA and elsewhere (Furhman, 2003; Fullan, 2007; Muller & Roberts, 2000), this is a more recent research focus in South Africa that has been growing since 1994 (Taylor & Jansen, 2003; Sayed, 2001; Crouch & Mabogoane, 2001; Anderson, Case, & Lam, 2001; Gilmour, 2001; Taylor, Muller, & Vinjevoold, 2003; Harley & Wedekind, 2004; Fleisch, 2006). The Programme to Improve Learning Outcomes (PILO) is one of the current initiatives that focus on systemic education change in South Africa. The intervention is regarded as a “trial at scale” and concentrates on building systemic alignment and coherence around the core goal of improving curriculum coverage in schools – an area consistently identified by research as one of the main reasons for poor learning outcomes in schools (Taylor & Moyana, 2005; Oosthuizen & Bhorat, 2006; Hoadley, 2010; National Education Evaluation and Development Unit [NEEDU] Report, 2013).

One of the key enablers of improving curriculum coverage in schools is effective leadership (Leithwood & Jantzi, 2005; Waters, Marzano, & McNulty, 2004; Leithwood, Seashore-Louis, Anderson, & Wahlstrom, 2004). In South Africa, the role of school leaders in contributing to improving the quality of education in the country has received ongoing attention. This is especially in relation to the roles and responsibilities of Principals, Deputy Principals and SMT members in supporting and strengthening the core functions of teaching and learning in the school (Bush, Glover, Bischoff, Moloi, Heystek, & Joubert, 2006; Hoadley, Christie, & Ward, 2009).

Schools are, however, complex organisations to lead and manage (Senge, Cambron-McCabe, Lucas, Smith, & Dutton, 2000). As educational institutions, they are located at the intersection of a number of societal influences that are political, economic and social in nature (Fiske & Ladd, 2005; Moloi & Strauss, 2005; Christie, 1999). Schools do not function in a vacuum, where they are insulated from these influences – they are, in fact, affected by them. Leaders therefore have a key role to play in mitigating the effects of working in complex environments and establishing the enabling conditions for effective teaching and learning in their schools.

This is particularly relevant in the context of KZN, where many schools are

characterised by poor infrastructure, inadequately trained teachers and a lack of resources. Teachers also have to deal with learner violence, teenage pregnancy, and alcohol and substance abuse at school (Naidoo, 2011; Grant, Gardner, Kajee, Moodley, & Samaroo, 2010). Furthermore, many of the communities served by the schools have high adult illiteracy rates, are located in peri-urban and remote rural areas where learners have to walk long distances to schools and experience the debilitating effects of isolation, poverty and social inequality (Dehaloo, 2011; Pillay, 2005). Research has shown that in communities like these where the social and developmental needs of learners are more pronounced, good leadership has a significantly greater effect on the lives of the learners (Leithwood et al., 2004).

This study on school leadership is undertaken as part of a larger case study of the PILO and its work in two school districts of KZN. The core focus of PILO's work is on improving curriculum coverage in schools. PILO has mapped out a clear rubric of interconnected relationships and behaviours at the school and district levels with a view towards routinising these as systemic practices that would contribute to the achievement of its goals. For the teachers, this involves consistent planning, tracking, reporting and reflecting on their teaching. As part of the change intervention, Grades 1 to 3 have been provided with lesson plans and supporting materials and Grades 4 to 12 received curriculum planners and trackers.

Besides assisting with curriculum coverage, the tracker is also used as a tool for professional development as it allows teachers to reflect on practice around both the quantity and quality of curriculum coverage. This then becomes the basis for a supportive supervision conversation with the HoD, using evidence of records and learners' work to consider how teaching practice can be supported and strengthened.

The Jika iMfundo Campaign also places strong emphasis on School Management Team (SMT) training – especially in the areas of instructional leadership and supervision – to develop the skills, competencies and dispositions required to strengthen teaching practice in the school. The change initiative provides tools and training for HoDs, Deputy Principals and Principals to enhance the role of the SMT in supporting the work of the teachers around curriculum coverage. In this study, we explore the effects of the training and support provided to Principals and SMT members in relation to their roles as instructional leaders in schools.

Reviewing the literature on instructional leadership

International understandings of instructional leadership

A significant body of literature exists in the USA relating to the changing role of the Principal as an instructional leader (Hallinger & Murphy, 1986; Murphy, 1994; Elmore, 2000; Portin, Schneider, De Armond, & Gundlach, 2003). Instructional leadership has a strong focus on *teaching and learning*, with a view to improving these interrelated processes (Robinson, Lloyd, & Rowe, 2008). Earlier scholarship in the USA focused

on the role of instructional leadership as one of the key elements to improve student outcomes (Hallinger & Murphy, 1986; Murphy, 1994). Some researchers suggest that instructional leadership is a critical aspect of a broader leadership approach, but agree that it focuses on the quality of teaching, modelling effective teaching practice, supervising the curriculum and making available quality teaching resources (Portin et al., 2003). Other scholars show that instructional leadership revolves around the following key roles and responsibilities (Blasé & Blasé, 2002; Seashore-Louis, 2003):

- Developing and promoting an instructional vision (revolving around teaching and learning) in the school
- Building and managing a collaborative school culture that is conducive to having conversations about teaching and learning
- Allocating resources to support and enable instructional practice
- Supporting teacher growth and development
- Focusing on the monitoring and assessing of instruction
- Establishing a school climate in which discipline is connected to instructional issues.

Elmore (2000) regards the Principal as the key actor in leading instructional improvement in schools. He asserts that “leadership is the guidance and direction of instructional improvement” (p. 13) and argues that this definition gives focus to the role of the Principal in the school. Rather than seeing instruction as one of the many (and often disconnected) activities that the Principal has to do in a school, the focus on instruction locates teaching and learning as *central* to the work of the school Principal. Elmore points out that, once the focus is on leading instructional improvement, everything else that the leader does should be *instrumental* to it. In other words, all the other leadership activities in the school should be connected to and supportive of the teaching and learning processes. All school improvement processes should therefore be directly and deliberately linked to the classroom processes of teaching and learning. However, Elmore notes that these processes cannot be adequately managed by Principals as individuals and require “distributed” leadership where expertise, knowledge and guidance are shared across a broader group of people at the school (Spillane, Halverson, & Diamond, 2004). Given the above, the role of the Principal and SMT members in exercising instructional leadership in the school becomes central to supporting and improving teaching practice and, ultimately, learner academic performance.

Conceptualising instructional leadership in South Africa

In South Africa, traditional conceptualisations of leadership are rooted in the public management approach (Knight, 1993; Bisschoff & Kamil-Sayed, 1999) and research that has examined the emerging phenomena of instructional leadership in South Africa is sparse (Luswata, 2001; Williams, 2001). Public management conceptualisations of leadership are rooted in the Newtonian or “mechanistic” paradigm of leadership and

management in which public bureaucracies are understood as operating like machines, with predictable and linear cause and effect relationships, certainty and consistency in outcomes and a hierarchy of control in order to achieve desired results (Senge, 1994; Wheatley, 1999; Meadows, 2002; Beck, 2013). The more recent “New Public Management” approach that emphasises effectiveness, efficiency and service quality is founded on the principles of Taylorism, where rules are applied as a top-down control mechanism, with adherence and compliance being regarded as essential means for achieving goals. This thinking and practice have traditionally informed the role of Principals as managers in schools, where the focus is on control, compliance with policy and the hierarchical arrangements of power and authority. In essence, good leadership in schools in South Africa has been equated with effective bureaucratic management, with very little attention being paid to how management practices are connected to improving teaching and learning in the school.

The bureaucratic style of management in South African schools was further entrenched during the previous dispensation of segregated and unequal education. Schools, especially the ones serving urban township and rural communities, formed part of a broader network of state-controlled agencies that were carefully monitored and where relationships with community groups and non-governmental organisations were restricted (Asmal & James, 2001). The management of these schools was characterised by rigid hierarchical structures that centralised control and entrenched authoritarian practices in the schools and districts (Witten, 2009).

South Africa’s transition to democracy further contributed to the dominant bureaucratic management approach in schools. This period was characterised by the dramatic transformation of all sectors of the state and led to a wave of policy enactments (in education, health, social services, etc.) that caused a tremendous amount of confusion, uncertainty and anxiety for the leaders and members of the institutions who had to implement them (Witten, 2009). This was particularly true for school leaders. Research in the USA shows that school Principals, when faced with large amounts of uncertainty and anxiety from the external environment, tend to focus on the school’s bureaucratic functions in efforts to “buffer” teachers and schools from these outside influences (Goldring, 1990; Goldring & Hausman, 2001). They do so by establishing hierarchical and rigid administrative structures that are often not conducive to collaborative work. Research in South Africa supports this finding that school Principals responded to the uncertainties of decentralisation, as well as the expanded range of responsibilities that have been placed on them by developing management styles in which power becomes more centralised around them (Knight, 1993; Bisschoff & Kamil-Sayed, 1999). In situations like these, broader participation in school-level decision making takes on symbolic rather than authentic forms (Grant Lewis & Naidoo, 2004). The impulse of bureaucratic control in education thus has deep historical roots and remains embedded in the practice of school leadership in South Africa today.

While government has recognised the need to improve learning outcomes, studies

show that inadequate training and professional development opportunities for school leaders remain a challenge and, in cases where these do occur, there is a strong focus on teaching about policy rather than on instructional leadership (Sayed, 2000; Mestry & Grobler, 2002). Bush et al. (2006, p. 11) note the limitations of bureaucratic control with regard to how teaching and learning is supported and managed in schools and state that “there are no accounts of how school Principals and other school managers, exercise ‘instructional leadership’ in their schools and seek to develop an effective culture of teaching and learning.” The findings of a study by Hoadley, Christie and Ward (2009) provide some important insights into instructional leadership in the South African context. Their study shows that the instructional focus, in terms of managing the curriculum and engaging in the teaching and learning processes, is dispersed across the School Management Teams and is not solely the work of the Principal. Instead, most of the Principals in their study focused on creating the enabling conditions for effective instruction by concentrating on the organisational and cultural aspects of the school (Hoadley et al., 2009).

The above studies lay the groundwork for further research that seeks to understand how Principals and SMT members connect their roles and work to supporting and strengthening teaching practice and improving learner performance in schools. This study attempts to shed some light on these important aspects of instructional leadership in schools.

Methodology

Research questions

This study on school leadership forms part of a bigger case study on systemic change in education in South Africa. The broader study focused on describing and exploring the change processes and their effects at three key levels of the system: the district (Circuit Managers, Subject Advisers and other officials); the school (the SMT members – Principals, Deputy Principals and HoDs); and the classroom (the teachers). For purposes of this study, we will focus on the effects of the training on members of the SMT.

Given the above, the following research questions guided the study:

1. What are the effects of the training on the practices of members of the SMT?
2. What are some of the challenges experienced by SMT members in fulfilling their roles of supporting teaching practice in their schools?

Selection of sites and participants

Data collection on the PILO intervention took place in the two school districts of Pinetown and uThungulu. In order to explore the effects of the PILO change process and interventions on the schools, the research team worked with the PILO team members and district officials to identify the institutions that were invited to participate in the study. Eight schools from each district were selected to participate in the study

(four primary and four high schools). The schools were chosen based on their levels of involvement in the PILO interventions.

Four of the selected schools were identified as “early adopters” which means that they displayed high levels of involvement in the programme, while the other four schools showed less of an uptake and involvement in the intervention. The purpose of using these two categories of schools was to document the effects of the training and identify some of the challenges to the initiative. Interviews were conducted with the Principals, HoDs and teachers from each of the schools, as well as the PILO coaches working in the schools.

Data collection methods

The research team conducted individual and focus group interviews with the participants in the study and used questionnaires that were developed around the two key research questions. Members of the research team also observed SMT training sessions, district-school meetings and SMT meetings. The observations served to deepen the team’s understanding of the context in which the intervention occurred and the effects of the change processes at the district and school levels. Field notes were compiled during the observations and used during the research team meetings to raise further questions that would be asked during follow-up interviews.

The research team also collected and reviewed a range of documents related to the PILO intervention. These included reports, reviews, articles, meeting notes and other artefacts that provided a deeper understanding of the nature of the intervention; the processes involved in its implementation; and the effects of the intervention. The team requested permission from both districts to conduct the study and obtained consent from all the participants involved in it.

Data analysis

The research team used the inductive approach to read and review the interview transcripts and identify categories of codes that could be developed into themes with multiple meanings (Strauss & Corbin, 1998). The use of open coding also encouraged “continuous revision and refinement of categories” in search of similarities, contradictory points of view and the development of new insights that were gathered from appropriate quotations from the participants in the study (Thomas, 2006). This process further allowed new explanations to emerge and enabled the research team to establish linkages between the research objectives and the data (Thomas, 2006).

A thematic analysis was also used to identify emerging themes (Smith, 1992; Braun & Clarke, 2006). The members of the research team immersed themselves in the data and identified categories of concepts for the teachers, Heads of Department, Deputy Principals and Principals at schools. Following this, the team looked for similarities and differences in the texts within and between each group. These formed the categories around which the themes would be developed (DeSantis & Ugarriza, 2000).

Validity

A number of strategies were used to minimise threats to the descriptive, interpretive and explanatory validity of this study. The same interview protocol was followed for all the participants and the linkages between the research and interview questions were checked for consistency (Bryman & Burgess, 1994). The team also transcribed all the interviews and focus groups in order to increase accuracy and emphasised triangulation between the data collected from the different sources. In addition, careful attention was paid to detail, both in the transcriptions of interviews and focus groups and in the descriptive field notes of the observed interactions.

The research team also strived for “analytic openness” (Creswell, 1998) and sought to make explicit the analytic framework through which it arrived at the findings from this study. This, together with the multiple strategies to minimise the validity threats outlined above, contributed to the credibility of the conclusions reached in the study.

Limitations

This study was exploratory in nature as it sought to develop a deeper understanding of the effects of the Jika iMfundo Campaign on instructional leadership in schools. Furthermore, due to the small sample size, the study refrains from making generalisations about school leadership across the two districts of KZN or other parts of the country. Its value however lies in identifying possible topics related to instructional leadership that can form the basis of future research.

Significance of the study

Any initiative aimed at improving learning outcomes in schools has to consider the role of school leaders in creating the enabling conditions for effective teaching and learning and strengthening teaching practice in the school. This study makes a contribution to emerging research and literature on the topic of instructional leadership in South Africa’s schools.

Findings

Seven final themes were generated from the categories derived from the data transcripts of the respondents. These themes relate to the effects of the Jika iMfundo Campaign on the roles of the SMT members as instructional leaders in their schools. Five of the themes revolve around specific aspects of instructional leadership in schools, while the other two focus on some of the challenges experienced by the Principals and SMT members in their work at the schools. These are discussed below.

A strengthened focus on curriculum management

One of the more pronounced effects of the Jika iMfundo Campaign on Principals and SMT members has been the refocusing on curriculum management as central to the work of the SMT. Most of the participants in the study shared this view and indicated

that the SMT training modules, as well as the tools that were used to strengthen supervision, led to a change in practice and a stronger focus on managing the curriculum in their schools. Some Principals noted that previous training relating to Curriculum 2005 left them confused and uncertain about their roles in managing the curriculum whereas the current training increased their knowledge of curriculum policy and improved their ability to plan, organise, monitor and evaluate the activities and effects of teaching and learning in their schools.

Other Principals commented that the activities of curriculum management were becoming institutionalised in their schools and made them more aware of what was happening in classrooms. One Principal noted:

... Now, I am aware of all issues affecting curriculum delivery, and I am in a position to account from an informed position due to frequent reporting and tracking ...

Another Principal noted that she was better organised and has been able to plan more effectively around supervising the work of the HoDs:

... As a newly appointed Principal, I have done a schedule for my SMT – when to check them because you cannot just sleep and say ‘tomorrow I am going to check your work’ ...

A third Principal spoke about the usefulness of the supervision and planning tools in improving curriculum management at the school:

... At the present moment, I am able to provide evidence of work as there are tools that I use and everything is recorded in the SMT files ...

Better planning also strengthened curriculum management in schools. A number of Principals and HoDs described the importance of developing a school year plan that contained a complete and functional teaching schedule and timetable, a schedule of learner assessment tasks and a calendar for tracking teachers’ and learners’ workbooks to ensure that teaching and learning is taking place on a daily basis and according to the schedule of the planner.

What is also noticeable in the data is that the Principals have made a clearer delineation between the roles of focusing on instruction and managing the administrative duties of the school. Some argued that, while it was important for a school to have a good financial and infrastructure management system, their core business was to improve learning outcomes in their schools.

An increased awareness of the “hard” and “soft” leadership skills required for instructional improvement

A number of participants in the study mentioned that the SMT training made them realise the importance of their leadership roles in building confidence and re-energising teachers to strengthen teaching practice in their schools. They believed that, while the technical tools for supervising, planning, monitoring and supporting the work of teachers form part of an important management function, building relationships of trust in the school where teachers feel part of a team and are acknowledged and supported, is just as important in achieving the school’s improvement goals.

A few Principals mentioned that the SMT training and their interactions with the coaches made them more sensitive to the social and psychological challenges that learners and teachers experienced in their schools. This caused them to become more responsive to their concerns and needs. One participant noted:

... The teaching of the iceberg assisted us to be sensitive to other people ... this is something that has improved a lot (in the school) ...

Other SMT members agreed that the training encouraged them to be more open in terms of communicating and sharing information and strengthened their ability to listen and assist their colleagues. A Principal shared the effects of these practices in her school:

... When people know everything about the school and what is happening, they have a sense of ownership ...

The SMT training also made the school leaders more aware of the relationship between the technical or “hard” skills of leadership and the culture of compliance that often serves to frustrate school improvement efforts. A number of them noted that they had gained a deeper understanding of how important it is to build relationships that would motivate teachers to achieve their goals.

The role of supervision as a professional and collaborative engagement

An essential aspect of instructional leadership is the ability to monitor, guide and support teaching practice in the school. This is also referred to as supervision and participants in the study acknowledged that this aspect of instructional leadership needed to be strengthened in their schools. One of the reasons for this is the isolated context within which teaching occurs – many teachers prefer to close off and safeguard their workspaces which prevents them from sharing good practices and working collectively to improve learning outcomes in their schools. The Jika iMfundo Campaign has placed a strong emphasis on professional collaboration, as essential to improving curriculum coverage that has become a thread that runs throughout the SMT training,

the work of the coaches in the schools and the interactions between the school and the district.

The SMT members mentioned how the training helped them revisit the concept and practice of supervision in their schools. One Principal noted that:

... It has been professional and effective ... looking back on the SMT training that we had whereby Jika iMfundo has explained all things like conducting difficult and professional conversations (as part of the supervision process) ...

The HoDs in some schools also mentioned that they were improving their supervision skills and that the SMT and school departmental meetings have become more effective and relevant. One HoD stated:

... Our meetings are shorter, to the point and have quality agendas. We share ideas and ensure that everyone is on the same page ...

One Principal commented on some of the attitudinal changes that he was beginning to see in the supervisory relationships of the members of the SMT:

... [the HoDs] are learning to work more closely together with the educators. They are becoming more sympathetic to the challenges of the teachers and polite and encouraging when dealing with them ...

One of the elements of a change in relationships noted by a HoD has been their approach to teachers which has been “*more constructive*” and “*less judgemental*”. The HoD also spoke about becoming more aware of the personal and emotional states of teachers when engaging with them. The teachers confirmed this view, commenting that the HoDs have become more capable of approaching educators “*correctly*” and were “*more available*”, “*approachable*”, and “*supportive*”.

Some teachers also mentioned that their perceptions of the SMT members as instructional leaders have changed, with one teacher noting:

... I’m beginning to see the HoD in a different way now. Before, she would come to fill in the schedules required by the department and moderate the papers. Now, she is talking more to me about my teaching and we are looking at the work of the learners. This has helped me to identify areas where I must strengthen my teaching ...

Based on the above data gathered from the interviews, there seem to be changes in supervision from being a compliance practice based on hierarchical authority, to one that is beginning to take the form of a developmental, professional and collaborative engagement.

Setting the direction for pursuing instructional goals

Participants spoke about the usefulness of the training in providing the “roadmap” or giving them clearer direction in achieving the school’s improvement goals. An important aspect of this is about achieving clarity of practice and purpose as instructional leaders. As the Jika iMfundo Campaign was being implemented, stakeholders across the system reported that they understood their own roles and responsibilities, as well as those of others in the change process better. Some teachers pointed out that the campaign has assisted them to understand the roles that the HoDs and Principals play more clearly, especially in supporting and strengthening teaching practice. One teacher mentioned:

... We know what our roles and responsibilities are from reading about it in our job descriptions, but we never fully understood the role that the HoD played in supervision at the school. I now understand that it is about supporting our work of teaching and looking for areas where we need help and where we can improve.

A few Principals and district officials indicated that it is not only the HoDs who had benefited from role clarification (through the SMT training and support from the coaches). They noted that everyone involved has become clearer about their roles and responsibilities in working towards the outcome of improving curriculum coverage for learners in the two districts. One district official stated:

Once the role of the SMT became clearer in relation to our role in the district, it allowed us to develop a common language and work around a common purpose. I think this also built mutual accountability between ourselves and the schools ...

A Principal mentioned that being clearer about her role and responsibilities as an instructional leader made it easier to lead and manage the school. She stated:

The Jika iMfundo has given me the direction because, before the campaign, we were just coming to school and will check the lesson plan without connecting it to the annual teaching plan ...

Another Principal supported this view by adding:

... Now we have direction. The teacher in the classroom knows on which date she would do what and when to assess the learners ...

Providing support and opportunities for professional development

Data from the respondents show that effective instructional leadership in schools has to be underpinned by professional development and support for teachers. This accords

with Elmore's (2000) concept of "reciprocal accountability" which involves *providing support* and *building capacity* (where needed) at the different levels of the system. This form of accountability adopts the principle that, for each unit of improved performance that is required, there should be the provision of a reciprocal unit of support and capacity. In other words, asking the teachers, Principals and SMT members to improve their practice without helping them to acquire the skills and providing the resources for them to do so will not lead to achieving the desired outcomes.

The HoDs in a number of schools observed an improvement in the support given to them by their Principals/Deputy Principals. They experienced the Principals as being more helpful by providing them with useful and much-needed information and assisting with some of their supervisory challenges. Some teachers also commented that their Principals were engaging more frequently with them, reviewing their work and providing them with feedback about what they were doing well and where they could improve. In one focus group, a teacher stated:

... The Principal has become more connected to us. She is talking a lot about the curriculum and how we are managing it. She has become more 'hands on' and is encouraging the HoDs to help us where they can ...

Data from the schools, as well as the PILO coaches, reveal that the HoDs have a greater "*development orientation*"; they visit the teachers more frequently and are more collaborative and open to hearing about the challenges they encounter in the classroom. In addition, one of the HoD focus groups reported that the SMT members shared the knowledge and skills gained at the Jika iMfundo training interventions with the educators. One HoD described how professional and collaborative engagement played out in the supervision relationship:

... You tell her about her strengths and, at the same time, you ask her how you can support her ...

School-based challenges to instructional leadership

SMT members identified a number of challenges that often have a negative effect on instructional leadership in the schools. Among the more common of these are the significant number of learners with barriers to learning; poor district support; inadequate teacher content knowledge and pedagogic skills; an unfavourable post-provisioning model in the rural school contexts; and inadequate school infrastructure. One Principal mentioned that:

... we have a challenge of overcrowding that does not have anything to do with the Jika iMfundo Campaign. It is one of the contextual factors ...

The challenge of overcrowding is a common one in many of the schools. Principals and HoDs noted that this situation discouraged effective teaching and learning, as the learners were cramped together and the teachers were unable to attend to their individual needs. Some complained that they received instructions from the district office to admit learners, even when the school was full. One Principal stated:

... We are a very big school but we do not have enough space. Floor space is our challenge and when you are trying to contact the department they just have their own way of working ...

Another Principal noted how the shortage of teachers affected instructional practice:

... There is a shortage of teaching manpower and SMT members are overloaded and not able to monitor some teachers ...

Many Principals and teachers also complained that inadequate support and resources from the Education Department sets them up for failure as they are expected to perform on par with well-resourced schools and are chastised when they underperform. One Principal commented on the lack of educational redress, stating:

... Look at my school, there are no resources but I am expected to perform like a school in a well-resourced area, whereas here I have to think about everything ...

Although government prioritises textbook provisioning, some schools still receive inadequate supplies and, where they do have sufficient stock, the learners are not allowed to take these home for fear of them being lost or misplaced. This also impacts negatively on curriculum coverage, as opportunities to consolidate the work through homework exercises are lost. In some instances, school budgets only allow for the purchase of textbooks in certain priority subjects which means overlooking the purchase of textbooks required in other subjects. A HoD at one school mentioned:

... We do not have enough resources, i.e. textbooks in some subjects, because we are told to prioritise mathematics and science subjects ...

External, environmental challenges to instructional leadership in schools

A number of participants in the study identified learner absenteeism as a major cause of poor learner performance. One of the contributing factors to this is the lack of learner transport to schools, especially in the rural areas. One Principal noted that the Department of Education has been struggling to address this issue in the province effectively. The HoDs also pointed out that absenteeism is sometimes caused by learner or family circumstances – learners from child-headed households are often away from

school during month end, as they have to go to banks to collect their social grants or stipends. One teacher observed that many girls also do not attend school during their menstrual cycle, as they cannot afford sanitary towels. A number of SMT members and teachers agreed that learner absenteeism is a serious concern for the schools participating in the Jika iMfundo Campaign as it has a negative effect on curriculum coverage.

Another challenge for learners is the effects of their living conditions on their learning and development. Some of the teachers reported that many learners are not able to complete their homework because conditions in the home are not conducive for studying and there is very little supervisory support for them at home due to the low education levels of their parents. For many parents and community members, the struggle for survival is a daily preoccupation and the responsibility for learning is acceded to the school. One of the teachers pointed out that:

... There is also a lack of parental involvement as most of learners stay with the grandmothers who cannot help them with the schoolwork ...

A HoD at another school echoed the sentiment of a number of other educators:

... A lack of responsibility and accountability of parents is another problem that we experience, where you find that homework is not done and parents do not assist ...

Other challenges of context that affect children's learning and development, as reported in the interviews, include low levels of parental involvement in schools due to distance and time; the difficulties associated with child-headed and single-headed households (including those where many of the learners are cared for by grandparents); ill-health and the burden of disease; drugs and alcohol abuse; and teenage pregnancy. Research has established a strong correlation between socio-economic status and educational attainment and quality (Van der Berg & Burger, 2003) and the challenges of context, especially in relation to poverty and social inequality, that will have to be attended to over the longer term.

The themes discussed above respond to the research questions that focus on the effects of the Jika iMfundo Campaign on instructional leadership and some of the challenges that frustrate the efforts of leaders in supporting teaching practice and improving learning outcomes in schools. Data from the study show that the Jika iMfundo Campaign has strengthened the focus on curriculum management in schools and reinforced the importance of leadership in building relationships and motivating teachers to change their practices. The data also highlighted a renewed focus of SMT members on supervision as a professional, supportive and collaborative engagement designed to improve teaching practice in the school. The use of the supervision tools

also contributed to a clearer understanding of the roles and responsibilities of instructional leaders which enabled them to provide clearer and stronger direction in pursuing the goal of curriculum coverage in their schools. The data also confirmed the importance of providing support and opportunities for professional learning and development to teachers which is central to the concept of “reciprocal accountability” in schools (Elmore, 2000). The last two themes focused on the obstacles to instructional leadership and highlighted the school-related, as well as the external challenges and complexities that affect leadership in schools.

In the concluding section, we identify three important implications of these findings for understanding and strengthening instructional leadership in schools.

Conclusion

Moving from bureaucratic management to a focus on instructional leadership

The Jika iMfundo Campaign in KZN, which focuses on curriculum coverage in order to improve learning outcomes in schools, has emphasised the role of school leadership as essential to achieving this goal. The implementation of the initiative and the use of tools in the schools have shifted leadership practice to focus more on the essential activities of teaching and learning in the school. This logic presupposes that all other school-based activities are instrumental to and should serve this core focus.

A strong bureaucratic management orientation continues to permeate school leadership in South African schools which promotes policy compliance without substantive and critical engagement around how these policies translate into effective practice and the achievement of its goals. The practice of instructional leadership, as shown in the Jika iMfundo Campaign, thus necessitates a shift in focus from bureaucratic management (where teaching and learning is incorporated as one of the many management activities) to centralising instruction. In so doing, the campaign highlights possibilities for *how* this shift in leadership focus and orientation can be made.

Balancing the agency of instructional leadership with the enabling conditions required for change and improvement

One of the underpinning concepts of instructional leadership is the notion of agency, defined simply as the ability of an individual or group of people to act in a situation and change it. The Jika iMfundo Campaign has underscored the importance of people as the key agents of change and improvement and has focused on providing support and building their professional capacities to do so. What will be required to strengthen instructional leadership in many of the schools will be a more concerted effort to create the enabling conditions that will address some of the intractable challenges to improvement.

This is not the work of an individual leader or a single school. Instead, it will

require a broader, systemic response that not only provides the resources and tools for improving curriculum coverage at the level of the classroom, but also addresses the challenges related to school and district infrastructure and capacity that hinder or frustrate the efforts of Principals, teachers and the SMT members to improve the quality of teaching and learning in their schools.

Instructional leadership as a systems-wide construct

While this study has focused on instructional leadership at the level of the school, what will be required to improve curriculum coverage at scale is the adoption of instructional leadership as a systems-wide construct – where the roles and responsibilities of the education stakeholders across the district, provincial and national levels are defined and aligned to support teaching and learning at the levels of the school and classroom optimally. This will require a more coherent system of engagement and support for schools around instructional improvement, which can come in the form of providing direct support (strengthening pedagogy and content, etc.), as well as indirect support (creating the enabling conditions for more effective teaching and learning), to schools.

Centralising instructional leadership as a systems-wide construct will have implications for how the work of supporting schools is undertaken. For example, Circuit Managers or Subject Advisers at the district level should primarily think of themselves as instructional leaders rather than just bureaucratic managers. This shift in conceptualisation accompanies a shift in practice and will define their roles and responsibilities, as well as highlight the skills, competencies and dispositions required for them to undertake their work in schools effectively.

The refocusing of instructional leadership will also require that more attention be given to developing *systemic instructional coherence* where professional roles and responsibilities; organisational cultures, systems and structures; resources; and stakeholder relationships across the different levels of the system are arranged in a clear and organised manner to mutually reinforce each other in connecting to and supporting teaching and learning in the classroom.

Lastly, the extent to which an instructional orientation can take root and become an essential feature of the system will depend on the amount of *noise* in the system – the distractions that serve to divert the focus or dilute the efforts aimed at improving learning outcomes. These are many and, amongst others, may include political influence and interference; rigid and self-serving bureaucratic structures; and the lack of capacity and resources to sustain the work of change.

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Notes

1. A ToC is a set of assumptions that underpins a simple 'if-then' dependency and informs the actions that will be taken. PILO's ToC is based on the assumption that improving learning outcomes will be achieved by improving curriculum coverage which, in turn, requires a change in the associated behaviours, practices and support required to achieve this core goal.
2. The SMT comprises the Principal, Deputy Principal, Heads of Department (HoDs) and other teacher leaders in the school.