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Ontario school trustees are provided with detailed compulsory training on the provincial legislation, meeting procedures, legal responsibilities and liabilities, education funding mechanisms and student well-being among others. They are required to sign a code of conduct and are bound to the legislative requirements of public servants ([www.opbsa.org](http://www.opbsa.org)). While the WCED is responsible to allocate funds for SGB training, and to conduct this training, the attendance of the training is voluntary (Xaba, 2011).

How principals engage with the elected governors/trustees is also significantly different between the two systems. PDSB principals are not members of the school boards, but do meet with the trustee representing the ward regularly to discuss school needs and performance. The PDSB principals regularly attend meetings with the trustees and the community to engage in areas of cooperation, collaboration and concern. The principals indicated that trustees often visit the schools within their wards should they need to do so, and that they can attend school board meetings to make representations to them.

WCED principals are members of the SGB, have to provide guidance to them in terms of legislation and policy, and submit the school academic improvement plan to the SGB annually (Government Gazette, 18 March 2016). The integration of the principal into the SGB, which is also the body that makes recommendations for educator posts, is another aspect of the critical roles that the WCED principals perform. School level governance must comply with existing legislation and policy set nationally and provincially, but SGBs have a wide latitude within those legislative guidelines (SASA 84 of 1996, Ch3, S20). For example, SGBs can determine the subject choices, and admission criteria for the school, code of conduct language policy to name a few (SASA 84 of 1996, Ch3, S21).

Within the WCED public system, there are 1520 individual schools that determine subject choices, admission criteria, codes of conduct and language policies within a school system that serves a public need. This demonstrates that the public school system cannot adequately address the broader issue of social cohesion, and provides limited benefit and understanding of the broader community, as each school serves the narrow interest of a small individual school-based constituency. This issue

illustrates one of the largest divergences between the two school systems and the principals engagement therein.

The roles that principals play within the school governance framework, the legislative responsibilities of the school governors, the constituents they serve and the interests they protect and promote occur either in a broad societal context, or in a narrow individual context. Public school systems serve the needs and interests of society by the advancement of social cohesion, and therefore must be seen within that broad societal context (Allen & Mintrom, 2014)

### **6.11 Chapter Summary**

This chapter details the areas of convergence and divergence in the roles of principals within each of the systems of this study. In both cases, there is evidence that there are policies to guide the process, and detail the responsibilities and performance criteria for principals. The application and interpretation of those policies are significantly different between the two systems.

In this chapter it becomes clear that each system approaches the preparation, selection, appointment and support of the principals in significantly different ways. The functions and responsibilities between the two are similar, in the theory, but not borne out in the practical sense.

The degree of responsibility that each system assigns to their principals is noteworthy, particularly regarding non-academic functions and how they are managed. There is also recognition that principals ought to be trained and developed, and that the training needs to match the roles they are expected to perform in the workplace. In addition to the required training, principals need to continuously develop their competencies and capacity to perform their required roles within the practical context.

The lack of proper structures, the influence of legislation, the role of governors and disparity in resources all affect how WCED principals perform their roles versus the PDSB counterparts.

## **Chapter 7 – Conclusion and Recommendations**

### **7.1 Introduction**

The South African education system is one that continues to face numerous challenges, which include infrastructure disparities between provinces, and within provinces as a result of the pre-1994 legacy. The lack of investment not only in infrastructure, but also in the training and development of educators and school leadership remain within the fabric of the system today (Wolhutter, 2010).

In addition to an appropriate curriculum and the educators required to empower learners effectively, school leadership has been widely accepted and understood to be critical to the success of learners (Leithwood & Rhiel, 2003). The development of effective school leadership is one area that can be addressed through relevant training, well designed development processes and administrative support (Bush & Jackson, 2002).

As schools are clearly and demonstrably organisations that have operational functions, they require effective leadership. While the social and economic context of each school may differ, the nature of the core operational functions and activities do not, and thus it becomes imperative that the appropriate skills are available to perform them. In conjunction with those skills, the leadership and management capacity requires support and resources to apply their skills effectively and efficiently.

This thesis has explored the process of preparing educators in two education systems for principalship, along career paths that begin in the classroom and proceed to the school leadership. What emerged from the study and what has been presented in the findings, and the analysis of those findings, clearly illustrates that the development of school leadership competencies in South Africa can benefit significantly by learning from systems and practices that have evolved in other contexts.

This study was specifically framed around the process and structures that lead to the preparation, selection and support of principals, and sought to answer the following questions:

- A. How are principals prepared for the positions that they are entrusted with?
- B. What training is provided to principals or aspiring principals in order to develop their operational school management competencies?

C. How could educators be trained to manage various operations in schools more effectively?

D. How are school principals selected or appointed?

The previous chapter provided an analysis of the findings of the Ontario model in Chapter 4 and the Western Cape model in Chapter 5. The summation of that analysis will be highlighted here in relation to these four sub questions.

## 7.2 Principal Preparation

There have been several attempts to install a formal training programme for South African school principals dating as far back as the early 1970's, although it was initially aimed at white principals employed in the Department of Education. In addition, there have been countless policy documents, white papers, drafts of white papers and ongoing discussions around the subject, which all resulted in the same outcome, as the question shifted from "whether to train principals" to "how to train principals" (Van Der Westhuizen & Van Vuuren, 2007).

After the ACE-SML training programme was developed for principals, and piloted for two years, it was subsequently stopped. A national standard for principalship was formulated and adopted in 2016 with a low threshold of qualifications required (see Table 5e, pg81). There have been other attempts to provide the necessary training, such as the establishment of a training centre by WCED in 2001, not only for principals, but for all educators.

WCED school leadership programmes are not mandatory (see Table 6c, pg108), or structured and delivered as a prerequisite for appointment to the position of principal. The Ontario system has this structure in place, with a staged progression towards principalship, that is easily measured and objective. This process is guided by a policy document, the OLF, with a curriculum developed with the professional body for educators, the OCT.

As the survey results in Table 5g (pg88) suggest there is clearly a training deficiency in the preparation process that WCED principals are expected or required to follow. This deficiency in the training is also in key performance areas of responsibility principals have, as per the SASP guidelines (Table 6d, pg112).

### **7.2.1 Implications**

The evidence presented suggests that the initial training of educators in Ontario is of a higher standard than for the Western Cape. Additionally, the entry criteria to teacher's college and the duration of the teachers programme lends itself to better prepared teachers entering the system in Ontario. The teacher preparation process and the subsequent hiring process is also robust, and many teachers first have to work in temporary positions before being hired full time. This process also acts as an additional screening mechanism, as these temporary posts will be conducted under close observation of seasoned teachers or school administrators.

WCED teachers are not as well supported in the early stages of their careers, as many schools are under-resourced as indicated by the participants. The WCED participants also indicated that the time for observation of new teachers is limited, due to their workload, and this is often delegated, but not always followed up on. The IQMS is an example of a working policy that is largely based on self-evaluation and largely fall into the category of “ticking boxes”, as per Principal D.

### **7.2.2 Recommendations for WCED**

Observation of new teachers is critical to their development during the early stages of their teaching careers. As Table 5b (pg77) shows, educators have potentially long careers, and the entry point is where these educators can be nurtured and developed to become future school leaders. The application of additional support resources to schools will be beneficial to making principals available to do critical observation of educator staff, which will have long term benefit to the system.

### **7.3 Training & Development**

The interviews with the WCED principals revealed that training was sporadically available, but of little practical value to them. All of them indicated that the WCED was merely “checking boxes”, that the focus of the training was on the wrong areas, and the format of the training using workshop models was of little value. Through CTLI, WCED established a number of courses that aim to close the gap and provide more relevant content (<https://www.wcedctli.co.za>). However, having failed to pass legislation that makes the programmes mandatory for the position, there is little motivation for aspiring principals to attend or complete this training.

Additionally, the provision and accessibility to training is only one part of the puzzle, it must be conjoined with comprehensive course material that is relevant and addresses the current education environment. The WCED participants did not have much positive feedback on the training overall, but it was particularly poor when the relevance of the material was raised. This once again contrasts significantly the feedback from the PDSB participants, who identified the relevance and value of the training, and could directly relate the course material to their work.

Training on its own does not ensure competency, nor does it develop proficiency. Training needs to be complemented with structured processes to develop the training programme into proficient practices, which need to be supported through appropriate mentoring programmes.

The findings and comparison demonstrate that application of the theory in the appropriate context and with the appropriate level of support is necessary for the development of school leadership to take place. This was revealed during the interviews with the PDSB principals and the structured and supported development programmes followed during their careers. Mentoring is also an essential part of this process, and one that while recognised in importance still remains as not yet fully embraced within WCED. Mentoring has been described as part of the professional development of educators, which subsequently leads to growth and advancement of their careers (Msila, 2012). As many principals within the WCED carry extensive workloads, and 80% still teach classes (Table 5m, pg. 95) it is evident that there is limited time available for mentoring.

The WCED participants were also clear that mentoring was not available to them formally or informally during their careers. The interviews revealed that they were left to “figure it out”, “thrown into the deep end”, “learn as you go along”, essentially by trial and error. The participants did benefit from these experiences, as they acknowledged the importance of mentoring, although they had not been beneficiaries of it themselves. They have made efforts to provide a degree of informal mentoring to their staff, as time and opportunity permits.

The PDSB approach is one of structured formal mentoring by means of an assigned mentor. The need to demonstrate leadership capacity before the interview process is part of the eligibility requirement., The mentor that is assigned is one who can provide the mentee with the required additional tools and skills to become effective in the principalship role.

Table 6e (pg115) provides details of the many responsibilities that are fully within the scope of WCED principals, which are beyond their initial training as educators. Even the ACE-SML course outline provided in Table 5f does not provide clear evidence that all those assigned responsibilities have been adequately addressed in the training provided. It was noteworthy that two of the participants gave the ACE-SML a low grading in terms of usefulness and relevance, because the focus was more on management instead of leadership.

### **7.3.1 Implications**

The role of WCED principals are highly encumbered with many responsibilities that they are not fully or adequately prepared for. While well-funded schools are able to supplement staff, and in some cases employ professionals to manage some functions, this is not the norm or possible in the vast majority of schools. The high workload (see section 5.8 pg 95) and large degree of expectations and responsibilities as detailed in Table 6e (pg115) illustrates that many principals are overwhelmed and are not able to be optimally functioning in their role. This is not beneficial to the learners or for staff development, when the principal of the school is unable to fulfil the most critical role of leadership.

### **7.4 Selection and appointment**

Perhaps the most divergent difference between the two systems is the process of selection and appointment to the position of principal. In the PDSB system and across the province of Ontario a uniform process is implemented, which is guided by the system needs. School board education officials and professionals are integral to the process, which starts with the superintendent engaging with the applicant to prepare the application information pack. The application information pack included all relevant documentation of the applicant and motivations by the principal and mentors the applicant has worked with to that point. The application pack forms part of the process that is further deliberated on by education professionals and professional managers within the relevant board. The selection process is objective and based on predetermined and established criteria that are compulsory for all applicants.

In the WCED system, the selection process involves two entities with different objectives and mandates. While legislatively required, it does not provide for the best case scenario, as many SGBs are not fully functional in terms of capacity, education and not fully equipped to act in the interests of the primary needs of the broader



education system. The authority that SGBs have in determining the specification of the vacancy, in a public school is misguided and potentially leads to ineffective outcomes. The objectivity of the process can also be questioned, as the interests of the SGB is devolved to the school and not the system. The evidence supports Molver's (2022) argument that the appointment of principals be made by appropriately qualified personnel, with the technical competence to measure the suitability of candidates for a position that is as critical as principalship.

### **7.5 Recommendations for WCED**

This study has revealed several areas of weakness in the WCED system as it relates to the role of principals. The evidence presented suggests that there are close to 50% of current principals who are (a) inadequately prepared for their positions (b) not well supported in terms of resources and training, and (c) have a high workload and level of responsibility that completely overwhelms them.

The role of the school leader has been well established to be critical to student success and achievement. This function can only be performed optimally when there is (a) relevant and appropriate training directly relating to their roles, (b) provided with resources that are able to develop the skills and competencies necessary to complement the training and (c) delegation of non-academic functions away from them to the appropriately qualified professional personnel to reduce the principal's workload and permit them to guide the academic functions of the school, for the benefit of the learners and staff.

### **7.6 Recommendations for further research**

This study was limited to the two systems and with a small number of participants who were interviewed in each system. While it is easier to draw the conclusions in the PDSB system, due to the formalised and well-established structure, this is not the case with the WCED system. It would be of considerable benefit to fully explore several avenues of additional research with the WCED education ecosystem in terms of the following:

- A longer-term study of educators that have entered the WCED system after the introduction of the SASP would be useful to undertake to evaluate the implementation of those standards and the affects that would have on the system.

- A comparative study of principals across all five quintiles and how the quintile funding model affects learner and staff performance and outcomes.
- A comprehensive review of the qualifications and training of all SGB recommended principals within WCED schools

## **7.7 Conclusion**

The primary and secondary questions that have been asked in this study have been comprehensively addressed. I have presented evidence that illustrates convincingly that principals in the Western Cape (a) are not adequately prepared for the complexity of their roles, (b) are poorly prepared for the position, (c) their training and development is haphazard, inconsistent and not legally required. Additionally, the involvement and ceding of the authority of selecting principals to SGBs is ill advised, and in many cases does not result in the best, most suitably qualified person being appointed to such a critical role of school principal.

School governance as practiced in South Africa, appears to be highly problematic (Xaba, 2011) without the added responsibility of educator selection contained within the applicable legislation. Taken one step further, if public schools are expected to serve societal needs and should provide this essential service for the public benefit, then policies relating to school governance at the individual school level has to ensure that they are empowered with the competencies needed to make this contribution.

This thesis has provided a side-by-side comparison between a system that works well in PDSB, to a system that does not in WCED. Two education systems that have the same colonial past, with vastly different approaches to meeting the needs of schools through the appointment of effective school leaders. While there are indeed policies that exist within the WCED and broader South African education framework, there appears to be the inability to make these policies a reality. The resource constrained environment that exists in the South African and subsequently WCED context appears to be an impediment to the leadership and management training process, which has a negative effect on the education system.

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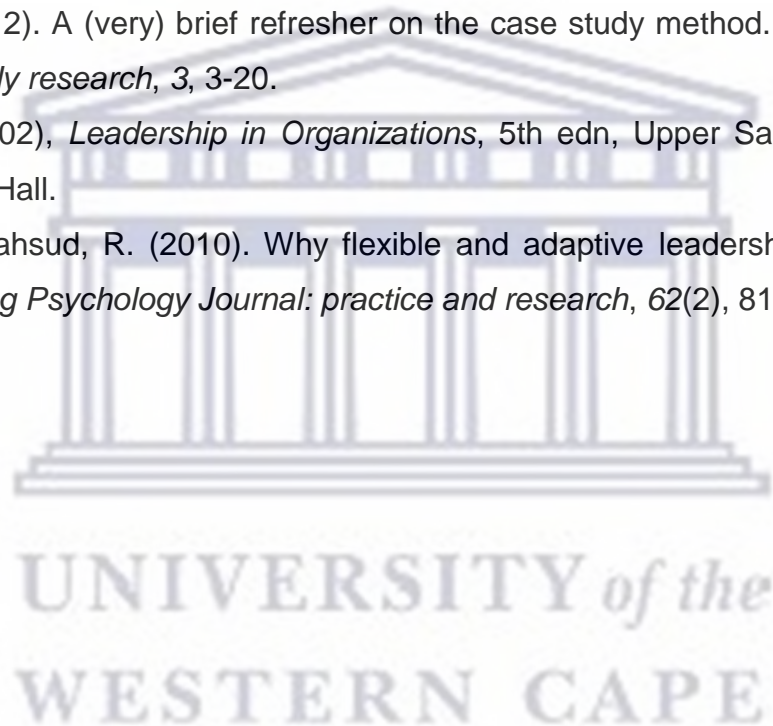
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## Appendix D



# SCHOOL OF BUSINESS & FINANCE

Muaath Gabier – 9432708

Thesis title

**A review of Principal training and development to determine preparedness as managers of organisations in the South African Context.**

### Survey Questionnaire

1. What is your Gender (M/F)
2. What is your Age
3. How Many years have you been and Educator?
4. How many years did you serve as Deputy Principal before becoming a Principal?
5. How many schools did you work at throughout your career before becoming Deputy Principal?
6. How Many years have you been a school Principal?
7. How many schools have you served as Principal?
8. Where did you receive your Education Training?
9. Since completing your initial training, have you taken additional training or career development programs?
10. How many years, if any, did you serve as subject head?
11. How many years, if any, did you serve as Grade head?
12. How many years, if any, did you serve as Head of Department?
13. Are you currently a Principal at Primary or Secondary Level?
14. If you answered Elementary level, which phase did you teach?
15. If you answered Secondary level, which subjects did you teach?
16. When you were deputy principal, how many classes did you teach per week?
17. When you were Deputy Principal, what were your areas of responsibility?
18. In your role as Principal, how many Deputy Principals do you have?
19. In your role as Principal, how many staff serve on your Senior Management Team?
20. In your role as Principal, how many classes do you teach per week?
21. At the school you serve as Principal, how many support staff are available to you?
22. In your role as Principal, how many times a month do you meet with your Circuit Manager?
23. How many Senior Management Team meetings are convened at your school every month?
24. In your role as Principal, how many staff are employed at the school? Please include all WCED and SGB staff.
25. How many students attend the school where you serve as Principal?
26. In you first three years as Principal, did you have a mentor?
27. After your first three years as Principal, did you have a mentor?
28. Since becoming Principal, have you served as a mentor?
29. Since becoming Principal, is there any additional support or training programs you believe would have helped you in your leadership and management position?

### **How may I go about contacting the researchers with any further questions or concerns?**

If you have any further questions or concerns after this, please contact the Principal Investigator, Mu-aath Gabier on [9432708@myuwc.ac.za](mailto:9432708@myuwc.ac.za) or 0720688928.

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