

DEPARTMENT OF EDUCATION MANAGEMENT AND POLICY STUDIES

FACULTY OF EDUCATION

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Education leadership learning: the  
experiences and perceptions of Master's  
students

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## RESEARCHER'S DECLARATION

I, Eric Eberlein, declare that the thesis "Education leadership learning: the experiences and perceptions of Master's students", which I submit for the degree Doctor of Philosophy in Education Management, Law and Policy is my own work, and has not previously been submitted in any form for a degree or diploma before in any tertiary institution. Where the work of others has been used, sources have been identified and acknowledged by means of complete references.

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The author, whose name appears on the title page of this thesis, has obtained, for the research described in this work, the applicable research ethics approval. The author declares that he has observed the ethical standards required in terms of the University of Pretoria's *Code of ethics for researchers* and the *Policy guidelines for responsible research*.

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## LANGUAGE EDITOR'S DECLARATION

I, Mrs. Ailsa Williams as the language editor declare that I edited "Education leadership learning: the experiences and perceptions of Master's students".

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## Dedication

This study is dedicated to my mother

**ANNETTE EBERLEIN**

27 June 1946 – 15 April 2009

and to my beautiful wife

**SHIRLEY**

(the only exceptional thing about me)

and to my son

**CALEB LIAM EBERLEIN**

born 17 February 2014

My beautiful boy – a GIFT from the Lord.

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and finally and most importantly, to God the Father, Jesus Christ my Saviour, my rock and my foundation and God the Holy Spirit – may what I do please You above all others.

## List of Tables and Diagrams

<b>Description</b>	<b>Title</b>	<b>Page</b>
Table 1.1	Leadership learning provision	37
Table 1.2	NQF levels for qualification types	42
Table 1.3	Outline of the thesis	61
Table 4.1	Instructional leadership activities	124
Table 4.2	The polar model of leadership learning	142
Table 5.1	Possible participants by gender and class	155
Table 5.2	Actual participants by gender and class	157
Table 6.1	Biographic, demographic and educational context of participants	182

## List of Diagrams

<b>Description</b>	<b>Title</b>	<b>Page</b>
Diagram 1.1	Elements of the Activity Theory	64
Diagram 4.1	The origins of knowledge and learning theory	104
Diagram 7.1	Model for Contextualised South African Education Leadership Learning	295

## List of Annexures

<b>Annexure</b>	<b>Title</b>	<b>Page</b>
A	Invitation to participate / letter of consent	321
B	Individual interview protocol	325
C	Request for permission to conduct study	332
D	Letter of permission to conduct study	335

## ABSTRACT

Research indicates that postgraduate education leadership learning programmes do not make the kind of contribution to leadership practice that is required to make significant improvements to education. This study investigated and described the experiences and perceptions of master's students of their own education leadership learning while enrolled in master's degree programme in education leadership.

This instrumental case study adopted a qualitative approach from within an interpretivist-constructivist research paradigm, and was underpinned by the tenants of Engeström's Activity Theory. The study found that although students reported a measure of transfer between theory and practice, both the content and instructional strategies of the programme that served as the activity system for the study failed to recognise the varying levels of leadership pre-knowledge and experience and the diversity of education leadership contexts within which students function. The study contributes to the body of knowledge of education leadership learning firstly by defining and describing the relationship between student pre-knowledge, experience and context and the application of the tenants of theories of learning such as andragogy during the development of education leadership learning programmes, secondly by identifying and describing the emergence of a secondary or incidental curriculum related to the students' exposure to and practice in the use of information communication technologies and thirdly by identifying and describing a number of challenges inherent in the use of a traditional master's degree for the professional development of education leaders. In its recommendations, the study supports the implementation of a professional master's degree programme and proposes a new model for the effective contextualisation of education leadership learning based on a case study and problem-solving approach to teaching and learning together with extensive use of the inverted or *flipped* classroom in order to facilitate education leadership learning that not only stems from within the diverse contexts within which the master's students live and lead, but also is directed towards the contextualised leadership learning that these students require in order to be and become more effective education leaders within not only their own unique school and leadership context, but within the South African education system as a whole.

## ABBREVIATIONS

ACE:SL	Advanced Certificate in Education: School Leadership
ANC	African National Congress
AT	Activity Theory
BEd	Bachelor degree in Education
BEd Hons	Bachelor of Education Honours degree
HEQSF	Higher Education Qualification Subframework
HOD	Head of Department
ICT	Information and Communication Technology
MEd	Master's degree in Education
MSA	Master' degree in School Administration
MSc	Master of Science
NC	National College for the Leadership of Schools and Children's Services
NCSL	National College for School Leadership
NPQH	National Professional Qualification for Headship
NQF	National Qualification Framework
PGDip	Postgraduate Diploma

SAIRR	South African Institute of Race Relations
SASA	South African Schools Act, Act 84 of 1996
SGB	School Governing Body
SMT	School Management Team
SQH	Scottish Qualification for Headship
ZPD	Zone of Proximal Development

## KEY WORDS

Education leadership learning, adult learning, education leadership development, education leadership preparation, Human Activity Theory, learning theory

## Table of Contents

<b>CHAPTER 1 .....</b>	<b>23</b>
<b>Introduction and Orientation to the Study.....</b>	<b>23</b>
<b>1.1 Introduction.....</b>	<b>23</b>
<b>1.2 Background and Orientation to the Study.....</b>	<b>25</b>
1.2.1 Defining the Concept of Education Leadership Learning.....	25
1.2.2 The Concept of Education Leadership .....	28
1.2.3 Education Leadership - The Current South African Situation .....	30
1.2.4 The Rise in Global Interest in Education Leadership Learning.....	32
1.2.5 Education Leadership Learning in Context – International and Local.....	34
1.2.5.1 The Provision of Education Leadership Learning - a Vignette of History.....	34
1.2.5.2 Location as Factor in Choice of Type of Education Leadership Learning.....	36
1.2.5.3 Education Leadership Learning Provision - a Global Sample.....	37
1.2.5.4 Education Leadership Learning Provision in South Africa .....	39
1.2.5.5 Educational Leadership Programme Selected as the Research Site .....	46
<b>1.3 Problem Statement.....</b>	<b>47</b>
<b>1.4 Rationale for the Study .....</b>	<b>49</b>
<b>1.5 Purpose of the Study.....</b>	<b>51</b>
<b>1.6 Research Questions .....</b>	<b>52</b>
1.6.1 Primary Research Question.....	52
1.6.2 Secondary Research Questions .....	52
<b>1.7 Theoretical Framework for the Study .....</b>	<b>53</b>
<b>1.8 Research Methodology .....</b>	<b>54</b>
1.8.1 Research Paradigm and Approach .....	54
1.8.2 Research Design .....	55
1.8.3 Sampling, Access and Research Sites .....	56
1.8.4 Data Collection .....	56
1.8.5 Data Analysis.....	57
1.8.6 Trustworthiness of the Study.....	58
<b>1.9 Ethical Considerations.....</b>	<b>59</b>
<b>1.10 Limitations and Challenges of the Study .....</b>	<b>60</b>
<b>1.11 Outline of the Thesis .....</b>	<b>61</b>
<b>1.12 Summary .....</b>	<b>62</b>
<b>CHAPTER 2 .....</b>	<b>63</b>
<b>The Theoretical Framework of the Study .....</b>	<b>63</b>
<b>2.1 Introduction.....</b>	<b>63</b>

<b>2.2 Engeström’s Activity Theory .....</b>	<b>63</b>
2.2.1 Subject(s) .....	65
2.2.2 Object and Outcome.....	66
2.2.3 Tools and Artefacts .....	66
2.2.4 Rules.....	68
2.2.5 Community.....	68
2.2.6 Division of Labour .....	68
<b>2.3 Summary .....</b>	<b>69</b>
<b>CHAPTER 3 .....</b>	<b>71</b>
<b>Education Leadership Learning – a Review of the Current Discourse.....</b>	<b>71</b>
<b>3.1 Introduction.....</b>	<b>71</b>
<b>3.2 Concepts and Terminology .....</b>	<b>72</b>
3.2.1 Concept Clarification - Education Leadership .....	72
3.2.2 Concept Clarification - Learning .....	76
3.2.3 Concept Clarification - Education Leadership Learning .....	76
<b>3.3 Reasons to Study Education Leadership Learning.....</b>	<b>77</b>
<b>3.4 The Importance of Education Leadership Learning .....</b>	<b>80</b>
3.4.1 School Leadership as a Profession in its Own Right .....	80
3.4.2 The Pressures of Being a School Leader .....	81
3.4.3 Increased and Increasing Decentralisation in Education .....	81
3.4.4 Changes to School Leadership Roles and Responsibilities.....	82
3.4.5 Effective Leadership for School Effectiveness and Quality Education.....	83
3.4.6 Changes to and Differences in International Education Contexts.....	84
<b>3.5 The Ideal Level for Education Leadership Learning.....</b>	<b>86</b>
<b>3.6 The Value to Leaders of Leadership Learning in Education.....</b>	<b>91</b>
3.6.1 The Value of Education Leadership Learning in the International Context.....	91
3.6.2 The Value of Education Leadership Learning in the South African Context.....	95
3.6.3 The Value of Education Leadership Learning - a Summary .....	97
<b>3.7 Summary .....</b>	<b>98</b>
<b>CHAPTER 4 .....</b>	<b>101</b>
<b>Education Leadership Learning and the Theories of Learning .....</b>	<b>101</b>
<b>4.1 Introduction.....</b>	<b>101</b>
<b>4.2 Education Leadership Learning in Relation to Learning Theory .....</b>	<b>101</b>
4.2.1 Concept Clarification - Learning and Learning Theory.....	102
4.2.2 The Origins of Knowledge and an Overview of Learning Theories.....	102
4.2.3 Conditioning Learning Theory .....	103

4.2.3.1 Behaviourism .....	103
4.2.4 Cognitive Learning Theories .....	104
4.2.4.1 Humanistic Learning Theories.....	105
4.2.4.2 Cognitivist Learning Theories.....	105
4.2.4.3 Constructivist Learning Theories.....	106
<b>4.3 Education Leadership Learning - Ideal Practice.....</b>	<b>107</b>
<b>4.3.1 The Foundations of Effective Education Leadership Learning .....</b>	<b>108</b>
4.3.1.1 The Capacities Required for Effective Education Leadership.....	108
4.3.1.2 The Processes by which Leaders Learn .....	109
4.3.1.3 Instructional Applications, Sources and Resources.....	116
<b>4.3.2 The Features of Ideal Education Leadership Learning .....</b>	<b>116</b>
<b>4.3.2.1 A Well-Defined Theory of Leadership.....</b>	<b>117</b>
<b>4.3.2.2 Curriculum Coherence .....</b>	<b>125</b>
<b>4.3.2.3 Active Instructional Applications and the Provision of Quality Internships .....</b>	<b>128</b>
4.3.2.3.1 Theory versus practice .....	129
4.3.2.3.2 Instructional applications/teaching and learning strategies.....	132
4.3.2.3.3 The context of education leadership learning .....	139
<b>4.4 Summary .....</b>	<b>143</b>
<b>CHAPTER 5 .....</b>	<b>146</b>
<b>Research Approach and Methodology of the Study .....</b>	<b>146</b>
<b>5.1 Introduction.....</b>	<b>146</b>
<b>5.2 Research Paradigm and Approach .....</b>	<b>146</b>
5.2.1 Epistemological Position of the Study .....	147
5.2.2 Ontological Position of the Study .....	147
5.2.3 Research Paradigm.....	148
5.2.4 Research Approach.....	148
<b>5.3 Research Methodology .....</b>	<b>150</b>
5.3.1 Research Design .....	150
5.3.1.1 The Case Study Design .....	150
5.3.1.2 Type of Case Study.....	151
5.3.2 Research Methods .....	152
5.3.2.1 Sampling.....	152
5.3.2.2 Types of Sampling.....	153
5.3.2.3 Choosing a Sampling Strategy for this Study.....	153
5.3.2.4 Selecting the Actual Participants.....	154
5.3.3 Data Collection .....	157
5.3.3.1 Data Collection Method - Interviews.....	157

5.3.3.2 Semi-Structured Interviews .....	158
5.3.3.3 The Interview Protocol.....	159
5.3.3.3.1 Tools and artefacts .....	160
5.3.3.3.2 Rules .....	162
5.3.3.3.3 Community and the division of labour .....	162
5.3.4 Data Analysis.....	163
5.3.4.1 Preparing and Organising the Data.....	165
5.3.4.2 Coding the Data and Establishing Categories and Themes .....	166
5.3.4.3 Data Analysis and Interpretation .....	167
5.3.4.4 Presenting the Data and Findings.....	168
<b>5.4 Trustworthiness and Credibility of the Study .....</b>	<b>168</b>
5.4.1 Member Checking .....	169
5.4.2 Crystallisation .....	169
5.4.3 Threats to Trustworthiness - Self-Reporting and Mono-Method Bias .....	170
5.4.4 Threats to Trustworthiness - The Role of the Researcher .....	174
<b>5.5 Ethical Considerations.....</b>	<b>175</b>
5.5.1 Informed Consent.....	175
5.5.1.1 Voluntary Participation .....	175
5.5.1.2 The Purpose of the Study.....	176
5.5.1.3 What Participants would be Required to Do .....	176
5.5.1.4 Benefits and Risks of Participating in the Study.....	177
5.5.1.5 Privacy, Confidentiality and Anonymity .....	177
5.5.1.6 How the Data will be Used .....	178
5.5.2 Access and Acceptance .....	178
5.5.2.1 Permission for Study – University, Participants and Ethics.....	178
5.5.2.2 Venues for Data Collection.....	179
<b>5.6 Summary .....</b>	<b>180</b>
<b>CHAPTER 6 .....</b>	<b>181</b>
<b>Education Leadership Learning - Data Presentation, Findings and Analysis..</b>	<b>181</b>
<b>6.1 Introduction.....</b>	<b>181</b>
<b>6.2 The Participants.....</b>	<b>181</b>
6.2.1 Overview of Participant Selection.....	181
6.2.2 Participant Profiles.....	182
6.2.3 The School and Leadership Contexts within which Participants Function.....	183
<b>6.3 The Findings of the Study – Format and Lay-out .....</b>	<b>185</b>
<b>6.4 Findings – Research Sub-Question 1 .....</b>	<b>186</b>
6.4.1 Tools and Artefacts.....	187
6.4.1.1 Module Learning Content .....	187

6.4.1.1.1 The content empowered participants as leaders .....	188
6.4.1.1.2 Participants gained leadership confidence and a leadership identity .....	189
6.4.1.1.3 Participants realised their own education leadership short-comings .....	190
6.4.1.1.4 The theory learned could be applied to practice .....	192
6.4.1.1.5 Modules provided an introduction to instructional leadership theory .....	195
6.4.1.2 Module Learning Materials .....	197
6.4.1.3 Instructional Applications / Teaching and Learning Strategies .....	198
6.4.1.3.1 The use of instructional applications appropriate to adult learners .....	198
6.4.1.3.2 Individual self-study .....	200
6.4.1.3.3 Class discussions .....	200
6.4.1.3.4 Student presentations .....	201
6.4.1.3.5 Sharing of experience and experiences .....	203
6.4.1.3.6 Collegiality and cooperative learning in the learning activity system .....	204
6.4.1.4 Assessment .....	206
4.1.5 The Use of Information and Communication Technologies (ICTs) .....	206
6.4.1.5.1 Exposure to and practice in the use of the internet.....	207
6.4.1.5.2 Value of internet and research training provided by the Institution .....	207
6.4.1.5.3 The Institution's use of an electronic learning platform .....	209
6.4.1.5.4 The attainment of academic and research skills .....	210
6.4.2 Rules .....	211
6.4.2.1 Rules Boosted Participants' Confidence in Their Own Abilities .....	211
6.4.2.2 The Rules Created Discipline which Benefitted Learning .....	212
6.4.2.3 The Rules Prescribed Dedication, Hard Work and High Standards .....	213
6.4.3 Community .....	215
6.4.3.1 Interaction with Other Students Added Value to Learning .....	216
6.4.3.2 Interaction with the Community had an Impact on Education Leadership Learning .....	218
6.4.3.2.1 Motivation .....	218
6.4.3.2.2 Providing and receiving support .....	220
6.4.4 Division of Labour.....	220
6.4.4.1 Supplementary Roles .....	221
6.4.4.1.1 Administrative staff .....	221
6.4.4.1.2 Study groups .....	222
6.4.4.2 Primary Roles .....	222
6.4.4.2.1 Fellow students.....	222
6.4.4.2.2 Lecturers.....	223
6.4.4.2.3 Supervisors.....	225
<b>6.5 Findings – Research Sub-Question 2 .....</b>	<b>227</b>
6.5.1 Tools and Artefacts.....	227
6.5.1.1 Lack of Consideration for Individual Pre-knowledge and Experience.....	228
6.5.1.2 Some Modules not Directly Applicable to Education Leadership Learning.....	229

6.5.1.3 Late or absent feedback .....	231
6.5.1.4 Insufficient Contact Time .....	231
6.5.1.5 The Amount of Work and Number of Assessments .....	232
6.5.1.6 Instructional Applications / Teaching and Learning Strategies .....	232
6.5.1.6.1 Lack of differentiation .....	232
6.5.1.6.2 Insufficient time for interaction and collaboration .....	234
6.5.1.6.3 Lack of variety in instructional applications .....	234
6.5.1.6.4 Ineffective use of the 'flipped classroom' concept.....	235
6.5.1.6.5 Insufficient practical application.....	235
6.5.1.7 Assessment .....	235
6.5.1.7.1 Portfolios of evidence as a barrier .....	235
6.5.1.7.2 Open book assessment.....	236
6.5.1.8 The Use of ICTs .....	237
6.5.1.8.1 Lack of computer literacy at the beginning of the programme .....	237
6.5.2 Rules .....	238
6.5.3 Community .....	239
6.5.3.1 Distances between Students Prevented Collaboration .....	239
6.5.4 Division of Labour.....	239
<b>6.6 Findings – Research Sub-Question 3 .....</b>	<b>240</b>
6.6.1 Tools and Artefacts - Module content and learning material.....	240
6.6.1.1 Modules that made Greatest Contribution to Leadership Practice .....	241
6.6.2 Tools and Artefacts - Contribution to leadership practice .....	242
6.6.2.1 Self-confidence as a Leader.....	243
6.6.2.2 Empowered to Empower Others .....	244
6.6.2.3 Insight into/Exposure to the Leadership Perspectives of Others .....	246
6.6.2.4 Empowered to be able to offer leadership advice at various levels .....	248
6.6.2.5 A Wider Perspective on Leadership and Leadership Styles .....	249
6.6.2.6 Improvement in Internet and ICT Skills and Utilisation .....	251
6.6.2.7 The Importance of ICTs in Education and Education Leadership.....	252
6.6.3 Rules .....	253
6.6.3.1 Values and Skills that Contributed to Leadership Practice .....	253
6.6.3.1.1 Responsibility .....	253
6.6.3.1.2 Time management, time consciousness and being organised .....	254
6.6.4 Community - Contribution to leadership practice .....	255
6.6.4.1 Professional Support .....	255
<b>6.7 Summary .....</b>	<b>258</b>
<b>CHAPTER 7 .....</b>	<b>259</b>
<b>Discussion of Findings, Contribution, Overview and Conclusion .....</b>	<b>259</b>
<b>7.1 Introduction.....</b>	<b>259</b>

<b>7.2 Discussion of the Findings</b> .....	<b>259</b>
7.2.1 Aspects of the programme that contributed to learning and to practice.....	260
7.2.1.1 Tools and Artefacts.....	260
7.2.1.1.2 Participants gained confidence and a leadership identity .....	261
7.2.1.1.3 The theory learned could be applied to practice .....	263
7.2.1.1.4 The modules provided an introduction to instructional leadership .....	264
7.2.1.1.5 The perception of learning material as a resource.....	265
7.2.1.1.6 The use of instructional applications appropriate to adult learners .....	265
7.2.1.1.7 The contribution of assessment to education leadership learning .....	267
7.2.1.1.8 The perceptions of the use of ICTs as tools and artefacts.....	268
7.2.1.2 Rules .....	268
7.2.1.3 Community .....	270
7.2.1.3.1 Widened perspectives on leadership and diversity in South Africa .....	270
7.2.1.3.2 Opportunities to network .....	271
7.2.1.3.3 The community as support and motivator .....	271
7.2.1.4 Division of Labour.....	273
7.2.2 Aspects of the programme that posed challenges to learning .....	274
7.2.2.1 Tools and Artefacts.....	274
7.2.2.1.1 Failure to acknowledge prior knowledge and experience .....	274
7.2.2.1.2 Modules not directly applicable to education leadership learning.....	275
7.2.2.1.3 Insufficient formal opportunities for collaboration and practice .....	276
7.2.2.1.4 Contact time, amount of work and assessment .....	277
7.2.2.1.5 The use of ICTs as a barrier and challenge .....	278
7.2.2.2 Rules .....	278
7.2.2.3 Community .....	278
7.2.2.4 Division of Labour.....	279
<b>7.3 The Contribution of the Study</b> .....	<b>279</b>
7.3.1 Education Leadership Context, Effective Education Leadership Learning and Learning Theory - Describing the Relationship and its Importance .....	280
7.3.2 The Emergence and Importance of a Secondary of Incidental Curriculum .....	281
7.3.3 Describing the Challenges to Education Leadership Learning Inherent in Traditional Academic Master's Degree Programmes.....	283
<b>7.4 Recommendations</b> .....	<b>286</b>
7.4.1 The Purposeful Integration of Learning Theory into Programme Design.....	287
7.4.2 The Adoption of a Case Study and Problem-Solving Approach to Learning .....	287
7.4.3 Effective Use of the Inverted Classroom Approach .....	288
7.4.4 The Inclusion of ICT Skills Assessment and Appropriate Training as Programme Outcomes ..	289
7.4.5 The Inclusion of Opportunities for Experiential Learning .....	289
7.4.6 A Professional Degree that Includes a Structured Research Component .....	290
<b>7.5 Recommendations for Further Studies</b> .....	<b>296</b>

<b>7.6 Summary .....</b>	<b>298</b>
<b>Bibliography.....</b>	<b>303</b>
Annexure A.....	321
Annexure B.....	325
Annexure C.....	332
Annexure D.....	335

## CHAPTER 1

### Introduction and Orientation to the Study

#### 1.1 Introduction

It is widely acknowledged that school leaders have an impact on the schools they lead (Hale & Moorman, 2003:5, Mestry & Grobler, 2004:128, Riley & Mulford, 2007:87, Crawford & Early, 2011:105), with Leithwood, Harris and Hopkins (2008:27) going as far as to say that “leadership is second only to classroom teaching” in its impact on school effectiveness and learner achievement. The impact of school leaders and their leadership has been confirmed by the results of numerous international studies pointing to the fact that school leaders have an influence on both learner achievement and performance and on school effectiveness and school improvement (Finestone & Riehl, 2005:138, Robinson, Lloyd and Rowe, 2008:31, Rhodes & Brundrett, 2009:362, Woods, Woods & Cowie, 2009:253, Zhang & Brundrett, 2010:154, Jacobson, 2010:33, Brauckmann & Pashiardis, 2012:18, Bush, 2012:1).

The work of Robinson *et al* (2008) in this regard has proven to be seminal in the debate on what education leaders *do* that has the greatest impact on schools and learners. They posit that education leaders who (a) establish goals and expectations, (b) plan and use resources strategically, (c) plan, coordinate and evaluate teaching and the curriculum at their school, (d) promote and participate in staff development and (e) create and maintain a safe and supportive learning environment (Robinson *et al*, 2008:25-30) have the greatest impact in their schools and on the learners at those schools. Sammons, Qing, Day and Ko (2011:97) corroborate this when they state that leaders and leadership impacts changes in both school- and learner outcomes via the impact they have on the educators and through them on the quality of teaching that takes place in schools. Effective leaders and leadership, they state, “promotes an orderly and favourable behavioural climate, positive learner motivation and a learning culture that predicts positive changes in learner behaviour and attendance” (Sammons *et al*, 2011:97). Huber and Muijs (2010:58) state that the role of the principal as school leader is a pivotal factor in school effectiveness and school quality, a fact that has been corroborated by studies in North America, Great Britain,

Australia and New Zealand, but also in Europe – countries such as the Netherlands, Finland and Sweden (Huber & Muijs, 2010:59). The results of this extensive research verify the findings of Robinson *et al* (2008:25-30) and confirm the fact that schools found to be or classified as successful schools “possess a competent and sound school leadership” (Huber & Muijs, 2010:59). They posit that the line of reasoning related to the importance of education leaders starts with the belief that schools matter and make a difference and logically follows through to the statement that “school leaders matter, they are educationally significant - school leaders make a difference” (Huber & Muijs, 2010:58). Eacott (2013:686) sums up this discourse concisely when he posits that in education, “leaders, and leadership, matters”.

This recognition of the importance of leaders and leadership in education and the “dramatic growth in the importance of the role assigned to school leaders” (Hallinger & Huber, 2012:359) has in turn led to a growing interest among academics and policy makers world-wide in the issue of effective education leadership learning. Bush and Jackson (2002:418) state that the leadership preparation and development that school leaders undergo is a vital part of developing a successful education system, i.e. one in which “teaching and learning is powerfully planned and delivered” and where learners and schools perform well. This interest in the preparation and development of school leaders that started in the mid -1980s (Robertson, 2008:24), as well as the study of the nature and characteristics of the leadership learning required to produce good leaders and promote good leadership (Bush, 2012:1), has now turned into an international phenomenon (Walker & Dimmock, 2006:127), and has become one of the major educational issues in the early years of the new millennium (Bush, 2007:321). Indeed, Orr (2011:2) believes that – internationally - preparing and developing school leaders has become one of the pivotal approaches in the quest for educational reform and the improvement of learner performance and success.

This thesis reports the findings of a study focused on education leadership learning that was conducted among master’s students in an educational leadership programme offered by a South African university. The study sought to understand and describe these master’s students’ experiences and perceptions of their own education leadership learning whilst enrolled in the programme.

## 1.2 Background and Orientation to the Study

Considering the fact that this study sought to understand and describe master's students' experiences and perceptions of their own education leadership learning, an understanding of the concept of education leadership learning as it pertains to this study is vital for the understanding of both the context and the findings of the study. The sections that follow will define that concept and will then further orientate the study with a discussion of the concept education leadership as the *raison d'être* of education leadership learning. This discussion of education leadership will explain the distinction between the concepts of leadership and management in order to explain the use of the term education leadership to encompass both these important functions. It will also highlight the changing role of school leaders in recent years and discuss the emergence of the interest in education leadership learning. Finally, this section will briefly introduce the context of education leadership learning, both internationally and here in South Africa, and will end with a brief introduction to the master's programme which served as the research site for this study.

### 1.2.1 Defining the Concept of Education Leadership Learning

Lumby, Crow and Pashiardis (2008:3) contend that no one global definition for the concepts of education leadership preparation and education leadership development exists. However, the definitions of these concepts put forward by authors in the field of education leadership learning show some similarities. Day and Harrison (2011:467) combine the traditional concepts of leadership and management and refer to the learning about these concepts simply as leadership development. For them, as it is for Bolam (2003:75), leadership development describes “the longitudinal process of expanding the capacities of individuals, groups and organisations to increase their effectiveness in leadership roles and processes”, a process that they say is “inherently multi-level”, meaning that the focus could be on the individual, on groups and teams or on the whole organisation (Day & Harrison, 2006:457). Walker and Dimmock (2006:125) see leadership learning as “the processes, contexts and mechanisms within particular courses or programmes which target how school leaders learn best”. This is echoed by Bolam (2003:75), who states that leadership learning can take place in either external or work-based settings. Bush (2012:2)

describes leadership development as “the whole process involved in educating leaders”. Simkins (2012:621) sums up this debate when he states that in the discussion of education leadership learning there is always the “problem of terminology”, with terms such as “training, development, education” being applied – sometimes arbitrarily – to the phenomenon, while the term *leadership learning* is often applied in a broader context.

In the discussion above it is important to note the distinction between education leadership development and education leadership preparation. Bush (2012:2) distinguishes between these two concepts in the following manner - preparation he describes as the learning that takes place *before* a school leader assumes office, while development denotes all the actions and processes that make up the education of leaders. He acknowledges (Bush, 2012:60) Ribbins’ (2008:62) argument that the *preparation* process extends beyond the bounds of formal programmes and includes the whole informal socialization process a leader undergoes at the hand of different role players – however, only formal opportunities for education leadership learning will be included in the concept of education leadership learning as it relates to this study. Walker and Dimmock (2006:126) describe education leadership preparation as “the formal policy intent, structures, frameworks and programmes designed and implemented to provide an articulated set of activities for both the preparation and ongoing development of potential and serving school leaders”. Here - unlike in the definition by Bush (2012:2) that links preparation to pre-service school leaders - the concept of preparation is linked to both potential (i.e. pre-service) and serving school leaders, while both the terms preparation and development are used to describe preparation. It is interesting to note that education leadership preparation and education leadership development are accorded different levels of importance in different parts of the world (Lumby *et al*, 2008:5).

From this distinction between education leadership development and education leadership preparation must now follow a clarification of the term *education leadership learning* as understood by and employed in this study. The use of this term by the researcher to name the phenomenon under investigation was influenced by three sources – firstly by the statement by Walker and Dimmock (2006:127) that “interest in *leadership* development and *learning* (own italics) programmes is

presently an international phenomenon” and secondly by the work of Day and Harrison (2006:127), who combine the traditional concepts of leadership and management when it comes to the learning that takes place in these fields and who also define education leadership learning as learning that encompasses both preparation and development. The third and final influence is that of Simkins (2012:2) who refers to the fact that – in general – the broader context of education leadership preparation and development is referred to as leadership learning.

For the purposes of this study, the concept of education leadership learning is defined as the broader context of all formal, planned, articulated and relevant learning activities and content that take place in or are presented as part of a formal course of study or programme aimed at the expansion of education leaders’ knowledge, capacities and skills in order to increase their effectiveness as education leaders. It must be noted that this definition does not (a) draw a distinction between the *development* and the *preparation* of leaders, but rather includes both these concepts, or (b) draw a distinction between the different levels, for example short courses, workshops, in-service training, diploma courses and postgraduate degrees, at which education leadership learning takes place, but rather focuses on the *education leadership learning* that is presented to both potential and serving education leaders at all levels. The researcher bases this lack of distinction between development and preparation and between different levels of education leadership learning on the work of Eacott (2013:688) who, in his review of educational leadership learning programmes offered in Australia, included in his review all taught (as opposed to research) academic programmes, including certificates, diplomas and master’s programmes “aimed at *current* and *aspiring* (own italics) educational leaders” (Eacott, 2013:688). The distinction here between a taught and a research master’s degree is an important one, and brings up the matter of professional degrees versus academic ones. A professional degree “represents a mastery of the subject matter and techniques of a professional field to a (high) stage of competence”, and although it might “extend the boundaries of knowledge in the field, it is directed primarily towards distinguished practical performance” (University of California, Berkeley, 2015), whereas academic degrees focus on “advanced studies in an academic discipline” that deliver “contributions to knowledge of the subject matter, rather than specific applications of knowledge to professional practices” and

“emphasise theory and are not primarily designed as preparation for professional careers” (New York State Education, 2007). Within the definition of education leadership learning proposed here, no distinction is made between professional and academic degrees, and indeed, the programme that served as the research site for this study - although a taught programme - is not considered a professional degree, but rather an academic one. The question of professional or academic degree is however one that will be addressed again later in this thesis.

It must be noted here however that the focus of this study is the *experiences* and *perceptions* of master’s students *of their own education leadership learning*, and that the concept of education leadership learning as defined above rather than the level of the programme in which the students experience this learning is important for this study.

### **1.2.2 The Concept of Education Leadership**

It is important to note at this juncture that the term school leaders as it is used in this thesis denotes not leaders at all leadership levels within a school, thus including terms such as principals, head teachers, head masters, school administrators, deputy principals, assistant principals, vice principals, heads of department and middle managers. The term education leaders denotes leaders in the field of education that work outside and in support of the traditional school context, and includes persons working as for example managers of school and/or education districts or regions.

The focus in this thesis on the concept of education leadership *learning* necessitates an exploration of the concept of education *leadership* as the reason for the existence of the learning. Although the term ‘education leadership and management’ is often used in an umbrella fashion (van Deventer & Kruger, 2011:67), Bush (2007:392) declares the two concepts, that of leadership and that of management, to be “distinct, yet both important”, and distinguishes between the two concepts by linking educational leadership to “change” and education management to “maintenance” (Bush, 2007:392), while van Deventer and Kruger (2011:68) states that, although the terms are often used interchangeably, they in fact should not be. However, it is important to note that, as Bush (2007:392) posits, “the concept of management

overlaps with that of leadership” and that “both leadership and management need to be given equal credence and importance if schools are to operate effectively and efficiently”.

Van Deventer and Kruger (2011:71) sees leadership and management as “opposite sides of the same coin” and distinguishes between leadership and management by associating the former with the vision, mission and direction of the school and the inspiration of all role players, and the latter with developing and implementing plans in order to accomplish the primary function of a school, which is teaching and learning (van Deventer & Kruger, 2011:68).

Botha (2004:240) describes a school leader’s role in the educational context as “a *balance* (own italics) between leadership and management functions”, the latter including functions such as “supervising the curriculum (and) improving the instructional programme of the school” and the former including functions such as developing a vision and mission for the school and building close relationships with people, both those employed by the school (staff) and those served by the school (the community) (Botha, 2004:239). Louis and Miles (Huber, 2004:673) state that “educational leadership includes administrative tasks (such as) managing and distributing resources or planning and coordinating activities *as well as* (own italics) tasks...such as promoting a cooperative school culture and...promoting a shared school vision”. This confirms the opinions of Leithwood, Jantzi and Steinbach (Bush, 2007:391) who posit that principals are very seldom conscious of whether a particular function or action in their busy daily programme is specifically a leadership function or a management one, and also the opinion of Bush (2007:392) who asserts that management and leadership functions overlap.

From the discussion above, it is clear that while leadership in the educational context is related to the more people-orientated actions such setting the vision, mission and direction of a school and motivating- and building relationships with all the different role players essential to the success of a school, management is more process and function-orientated and involves, for example, making and implementing plans and strategies to ensure the effective delivery of the core function of a school, namely teaching and learning. However, these two aspects should not be separated, as they

each form a very important part of the “complex and interrelated...coloured patchwork” (Huber, 2004:671) of tasks and functions - some related to working with people and others related to managing aspects such as the school’s budget or facilities - that make up the role of the 21<sup>st</sup> century school leader. This complexity has brought about a of shift of focus from “an emphasis on administrative tasks to an emphasis on the development and improvement of instruction as well as student (learner) achievement” (Huber, 2004:ix), in other words a shift from a more managerial approach to running a school to, a more leadership-oriented approach to the job. It is this complexity of the school leaders’ role, together with the increasing complexity of the society within which modern schools function (Huber, 2004:671), that led Huber to describe school leaders as “multi-functional miracle beings” (2004:672).

While Imants and de Jong (Huber, 2004:673) refer to this complex integration of leadership and management tasks as “integrated school leadership” and Huber (2004:669) refers to it as “professional school leadership”, the concept of *instructional leadership* – school leadership actions and activities that focus on the learning progress of learners and that encompass management- as well as leadership-orientated activities directed toward such progress (Southworth, 2002:77, Huber, 2004:673) - also describes the combination of the concepts of management and leadership under the banner of educational leadership (Southworth, 2002:73).

### 1.2.3 Education Leadership - The Current South African Situation

*“A school stands or falls on its leadership... school principals are critical to the improvement of our levels of learner performance... they are a key weapon in our arsenal to turn underperforming schools around”*

Minister of Basic Education Mrs. Angie Motshekga  
(Department of Basic Education, 2010).

Because the quality and effectiveness of education leadership makes a significant contribution to both organisational and learner outcomes, results and performance, schools both internationally and here in South Africa, require more effective leaders

in order to provide the desired quality of education (Bush, 2007:391, Spillane, 2005:70). However, many South African schools are not delivering the kind of quality education expected by its citizens. Bernstein (Centre for Development and Enterprise Round Table, 2011:2) believes that far too many South African schools are failing in their duty to provide quality education to young South Africans. She contends that effective school leadership is one of the key aspects currently missing and which therefore contributes largely to the current education crisis in South Africa. Mestry and Grobler (2007:127) indicate that it is imperative that South African school leaders possess the skills, knowledge, attitudes and values required for them to be able to lead their schools effectively, but that one of the greatest challenges for local school leaders is the fact that they are seldom formally trained or prepared for the tasks that they are expected to perform (Bush & Onduro, 2006:359, Mathibe, 2007:523, van der Westhuizen, Mosoge and van Vuuren, 2007:705).

Harris (2004:11) makes it clear that because effective leaders have such a powerful influence on school performance and effectiveness, schools that are poorly managed and led will naturally suffer in terms of both learner and organisational performance. Studies by van der Westhuizen in 2004 (Bush & Onduro, 2006:363) and again by Bush and Heystek (2006:66) in 2006 show that 66% of principals in South Africa have not studied beyond their initial teacher qualifications, and it is this very lack of formal leadership learning in the local and African education sector that is to blame not only for many of the problems in education in South Africa and the continent at large, but also for the sparseness of literature on the topic (Bush & Onduro, 2006:364). This is corroborated by Mathibe (2007:523) who believes that one of the major reasons for the poor results achieved in so many South African schools is this lack, among many principals, of the appropriate leadership skills to lead their schools effectively.

With a South African Institute of Race Relations (SAIRR) report released in 2008 declaring that almost 80% of the public schools in South Africa are dysfunctional (SAIRR:2008), and in the light of the established link between effective school leadership and school effectiveness established above (Finestone & Riehl, 2005:138, Robinson *et al*, 2008:31, Rhodes & Brundrett, 2009:362, Woods *et al*, 2009:253, Zhang & Burnett, 2010:154, Jacobson, 2011:33, Brauckmann & Pashiardis, 2012:18,

Bush, 2012:1), it is fair to state that many public schools in South Africa are experiencing severe leadership challenges.

#### **1.2.4 The Rise in Global Interest in Education Leadership Learning**

The world-wide trend of continuous education system reform has led to “the dramatic growth in the importance of the role assigned to school leaders” (Hallinger & Huber, 2012:359), to the point where there is now a recognition of school leadership as a specialist occupation (Huber, 2010:236, Bush, Joubert, Kiggundu & van Rooyen, 2011:32). As alluded to earlier, the role of the school leader has become both more complex and more demanding (Huber, 2004:670, Fink, 2005:3, Harris & Townsend, 2007:167). This complexity is exacerbated by the expansion of the role of the school leader within increasingly decentralised education systems world-wide (Mestry & Singh, 2007:478, Bush *et al*, 2011:32, Huber, 2004:viii) to include increased responsibility for school financial-, human resources-, site- and building management as well as the implementation of government initiatives and policies (Paterson & West-Burnham, 2005:108). This is corroborated by Thody, Papanoum, Johansson and Pashiardis (2007:41) who explain the increased demands and complexity of the school leadership role as the result of increased curricular demands and an increase - within this ever-decentralising education context world-wide - of both governmental and parental expectations and demands for higher academic results and performance standards (Brauckmann & Pashiardis, 2011:19), and for better education in general (Thody *et al*, 2007:41). They contend that, within these decentralised systems, the concept of site-based management (a) makes school leaders directly responsible for the quality and performance of schools and (b) has made parents and the school community far more powerful, irrevocably changing the school-home-community dynamic and increasing the complexity of the relationship between school leaders and these important stakeholders (Thody *et al*, 2007:41). In essence, the once limited role of the principal as a “bureaucratic administrator” has fallen away, to be replaced with a “new, far larger and more demanding set of roles” (Brauckmann & Pashiardis, 2011:19) that include responsibility not only for leading and driving the process of instruction, but also managing financial and human resources, public relations and staff development. Finally, both Berkhout (2007:407) and Shoho and Barnett (2010:561) contend that, increasingly, societies are looking

towards schools to solve a hugely diverse range of societal problems ranging from a lack of productivity to issues of ethnic diversity and a lack of social cohesion, putting schools and school leaders “squarely in the spotlight for taking on social reforms” (Shoho & Barnett, 2010:561).

South African school leaders, in common with their international peers, face many challenges. South Africa does not have a formal requirement for appointment to a school leadership position, and school leaders are most often appointed on the basis of their good teaching record rather than on the basis of any demonstrated leadership ability or skill (Bush & Moorosi, 2007:63). This means that many South African school leaders are not appropriately qualified or skilled for the ever-increasing demands of the role described earlier (Mathibe, 2007:523), with the range and scope of changes in education after the attainment of democracy in 1994 changing the task of the school principal irrevocably (van der Westhuizen & van Vuuren, 2007:434), “rendering many serving principals ineffective in the management of their schools” (Van der Westhuizen, Mosoge & van Vuuren, 2004:705). Many school leaders in South Africa serve schools in severely deprived township or rural communities, where unemployment, poverty, drug abuse and other social ills are the order of the day (Bush *et al*, 2011:40).

Ultimately, one of the results of the recognition of these changes to the role of the school leader and the increased demands placed on school leaders, has been a recognition of the fact that this role can no longer be filled by “persons with traditional leadership concepts” (Huber, 2004:672) and that meeting the demands set by the new conceptualisation of the school leadership role “requires highly skilled and well-prepared leadership” (Bush & Moorosi, 2011:63). It has also led to the recognition of the fact that the development and implementation of effective education leadership learning programmes and opportunities could make a significant contribution to the improvement of leaders’ leadership practices (Brauckmann & Pashiardis, 2011:19), which in turn will have a positive impact on learner success and school effectiveness (Robinson *et al*, 2008:31).

Hess and Kelly (2005:2) sum up this discourse admirably when they state the following:

*“School principals are the front-line managers, the small business executives, the battlefield commanders charged with leading their team to new levels of effectiveness. In this new era of accountability, where school leaders are expected to demonstrate bottom-line results and use data to drive decisions, the skill and knowledge of principals matters more than ever.”*

### **1.2.5 Education Leadership Learning in Context – International and Local**

This section will provide a brief history of the provision of education leadership learning as seen from the perspective of the British education system and will also highlight a number of issues in the current discourse in this field pertinent to the orientation and background of this study.

#### **1.2.5.1 The Provision of Education Leadership Learning - a Vignette of History**

There is at present great interest in- and a large body of literature on education leadership learning (Bush & Moorosi, 2011:61) as a result of the recognition in the first place of the need for many education systems to improve and in the second place as a result of research findings that point to the positive influence of effective school leadership on school and learner success (Hallinger & Huber, 2012:359). Tracing the history of this interest in the phenomenon in the United Kingdom, Simkins identifies three distinct eras into which the development of education leadership learning and the interest in this field can be divided, namely the era of administration (2012:623), the era of management (2012:624) and the era of leadership (2012:625).

In the era of administration (1944 up to the mid-1980's), the school leader acted primarily as an administrator, with his or her role derived from the roles and practices prevalent in other human services administrative positions within the “bureau-professional regime” (Simkins, 2012:623). However, towards the end of this era, interest in the academic and professional training of school leaders “started appearing on the education agendas of many countries” (van der Westhuizen & van Vuuren, 2007:432), and the nature and scope of this role came into question in the

United Kingdom and elsewhere, as did the nature of the preparation and learning required for school leaders. A distinction began to be made “between the generic and specialist professional models of administration”, with the former seeing school leaders appointed from within the ranks of experienced teachers, and the latter seeing school leaders being appointed from within the ranks of those who had completed a postgraduate qualification in education administration (Simkins, 2012:623).

In the era of management (mid-1980’s to mid-1990’s), the “bureau-professional regime” began to come under fire for its lack of consistency and education quality. Consequently, this era saw the introduction of management ideas into the school leadership discourse (Simkins, 2012:624). This happened against a backdrop of the decentralisation of education, and saw school administrators increasingly becoming school managers. It also saw the introduction of standards and competences for managers and greater measures of appraisal and oversight. This era also saw a more coordinated approach toward the provision of education leadership learning and an increase in the involvement of providers other than just universities (Simkins, 2012:625). During this period (1990 - 1994) in South Africa, the discussion papers published by the aspiring African National Congress (ANC) government, although proposing greater involvement in school governance of both educators and parents, did not yet reflect the later concern for the professionalisation of school leadership (van der Westhuizen & van Vuuren, 2007:435).

The final era described by Simkins (2012:625) is what he calls the leadership era (mid-1990’s to date). In this era, the mere management of the responsibilities devolved to school in decentralised systems of education was no longer enough. Politically and societally, concern for the quality of education was on the increase, and the manner in which to address this concern appeared to be the introduction of leadership to the concept of management that had until then been the norm in education (Simkins, 2012:625). This shift to leadership eventually led to the establishment in the United Kingdom of the National College for School Leadership (NCSL) in 2000, and the development of what Bolam in 2004 (Simkins, 2012:626) called the “most comprehensive and sophisticated leadership development model in the world”. This era also coincides with the attainment of democracy in South Africa

in 1994. The shift in the United Kingdom indicated by Simkins is reflected in this country by a number of post-democracy policy publications and proposals, starting in 1996 with the publication of the report of the Task Team on Education Management, and followed in 2004 by the proposal for the South African National Professional Qualification for Principalship and the first draft of the South African Standards for Principalship in 2005 (van der Westhuizen & van Vuuren, 2007:439).

Although Simkins refers specifically to the development of education leadership learning in the United Kingdom, these eras and his exposition of the history of education leadership learning in the United Kingdom, with possibly some adjustments to the dates, serves well as a vignette of the phases of development for both the concept of school leadership and of education leadership learning provision globally.

#### 1.2.5.2 Location as Factor in Choice of Type of Education Leadership Learning

Practice in the provision of education leadership learning around the world varies, and this variation is caused, to a large extent, by two considerations - the first is what a particular education system sees as the purpose of such learning, and the second, which is linked to the first, is the geographic location of that system. Generally speaking, the current focus of education leadership learning provision in the *developed* global West is on leader replacement and leadership succession in the face of the imminent loss to retirement of the so-called baby boomer generation of school leaders (Harris & Townsend, 2007:167, Bush & Moorosi, 2011:62), while in the *developing* regions of the world (i.e. the global South), the focus is generally on the preparation and development of un-or under-qualified school leaders (Bush & Oduro, 2006:359, Bush & Moorosi, 2011:62). It is thus fair to say that in the developed global West, education systems generally focus on leadership preparation, while for education systems in the developing global South, the focus is more on leadership development for those school leaders who have assumed leadership roles without any preparation or training.

### 1.2.5.3 Education Leadership Learning Provision - a Global Sample

Many countries globally have formal education leadership learning programmes and national education leadership qualification structures in place (Mestry & Singh, 2007:478). The study by Bush and Moorosi (2011) on school leadership development in Commonwealth countries serves as an example of this fact, with their study revealing the following about global education leadership learning provision:

<b>Country</b>	<b>Education Leadership Preparation</b>	<b>Education Leadership Development</b>	<b>Service Providers</b> AI = Academic Institution S = State P = Private
Australia	Optional	Optional	AI, S, P
India	Mandatory	Mandatory	AI, S, P
Namibia	Not provided	Optional	AI
New Zealand	Optional	Optional	AI, S, P
Nigeria	Recommended	Recommended	AI
Papua New Guinea	Mandatory	Mandatory	AI
Seychelles	Not provided	Recommended	AI, S
Trinidad & Tobago	Recommended	Recommended	S
Uganda	Not provided	Recommended	AI, S

Table 1.1 - Leadership learning provision - Commonwealth (Bush & Moorosi, 2011:66)

Their research found that although both leadership preparation (pre-service education leadership learning) and leadership development (education leadership learning for serving school leaders) is mandatory in only two countries of the Commonwealth, the majority of the member countries make provision for either preparation or development of school leaders. In all of the countries except Trinidad and Tobago, education leadership learning is offered by academic institutions, indicating to some degree the level of importance afforded this vital function in the Commonwealth.

All states in the United States of America, except for Michigan and South Dakota, require school administrators to be licensed, in other words to have successfully completed a regulated and prescribed number of hours in an approved education leadership learning programme, usually presented under the auspices of a traditional university or college (Hale & Moorman, 2003:4).

Although there has been no mandatory qualification for school leaders in the Netherlands, de-centralised education leadership learning provision is done at numerous levels and types of institutions. So for example, five universities in that country formed a consortium in the mid-000's to found the Netherlands School of Educational Management based at the University of Amsterdam. This Institution offers a two year school management qualification in the distance education mode (Derring, Brundrett, Slavikova, Karabec, Murden & Nicolaidou, 2005:35). These education leadership learning programmes focus on skills to enable school leaders to set a vision, to inspire, to stimulate learning and to link closely with the communities served by the schools, and make use of a framework within which both theory and practice are incorporated (Derring *et al*, 2005:34).

Education leadership learning is seen as a high priority function in France. French school leaders are obliged to complete a mandatory twenty (20) week course consisting of both theoretical and practical training, while those who wish to further their studies can attend one of several universities in order to complete the equivalent of a master's degree in school administration (Derring *et al*, 2005:36).

In Hong Kong, education leadership learning programmes focus on the six core areas of school leadership, namely (a) determining strategic direction and reading the policy environment, (b) leading teaching, learning and the development and implementation of the curriculum, (c) leader and teacher growth and development, (d) staff and resource management, (e) quality assurance and quality management, and (f) external communications and community connections (Walker & Dimmock, 2005:128).

The system for education leadership learning in Cyprus calls for school leaders to attend compulsory in-service training that takes place weekly for a period of one year

(Thody *et al*, 2007:44), while Swedish school leaders complete the two year university-based National Principals' Training Programme once they have served at least two (2) years in office (Thody *et al*, 2007:46).

English school leaders are mostly graduates of specialised university-based education leadership courses, with MSc degrees in education management being popular from the mid-1970's onwards (Thody *et al*, 2007:45). Although the English National Professional Qualification for Headship (NPQH) introduced in 1997 ceased to be mandatory in April 2012 (Bush, 2012:13), the former National College for School Leadership (NCSL) inaugurated in 2000 and now recently renamed the National College for the Leadership of Schools and Children's Services (NC), remains responsible for "recruiting, training, supplying and sustaining school leaders and leadership" in England, according to Gunter and Thomson (2009:469), while university master's degrees remain "a significant, but minority pursuit" among school leaders as a means of developing and improving their leadership practice (Thody *et al*, 2007:45).

All the above is by way of introduction to the discourse on global education leadership learning - a detailed discussion of the Finnish education leadership learning system will be provided in Chapter 4.

#### 1.2.5.4 Education Leadership Learning Provision in South Africa

South Africa, like many other African countries, does not have a formal requirement for appointment to a school leadership position (Bush & Oduro, 2006:362, Bush & Moorosi, 2007:63), nor does it have any form of overarching school leadership preparation or licensing structures or programmes (Mesty & Singh, 2007:478). The traditional practice in South Africa and other countries without formal requirements for school leadership appointments is to appoint principals from within the teaching fraternity, using their records as *teachers* as criteria (Bush & Moorosi, 2007:62). This has been shown to be ineffective, as teaching excellence does not always translate into leadership competence (van der Westhuizen & van Vuuren, 2007:434).

South Africa's African National Congress (ANC) led government took the first step in the process of evaluating the state of school- and education management and leadership in the wake of *apartheid* shortly after the attainment of democracy in 1994 with the appointment in 1996 of a Ministerial Task Team on Education Management Development under the leadership of John Godden. The report of this team, entitled "Changing Management to Manage Change in Education", was published in December 1996, and recommended that South Africa's strategy for the development of management in education should focus on (a) the development of school leaders as managers, (b) the development of management by teaching and making operational the principles of good management in schools, and (c) the development of organisations at all levels of the education system (provincial departments of education, education districts/circuits, schools) in order to improve management within the education system as a whole (Department of Education, 1996:33). In order to operationalize this strategy, the Ministerial Task Team put forward a framework with five (5) key components, these being (a) *strategic direction* - creating the capacity within both departments of education and schools to "set the course" for these organisations, (b) *organisational structures and systems* - developing systems and structures that would promote the delivery of effective education services, (c) *human resources* - providing development opportunities for human resources at all levels of the education system, (d) *infrastructure and other resources* - creating the infrastructure for decision-making and making sure that managers at all levels of the education system have adequate technical, financial and material support, and (e) *networking, partnerships and communication* - creating links between people and organisations both inside and outside of the country in order to improve management within the education system as a whole (Department of Education, 1996:38). It is significant to note that this Task Team refrained from suggesting the introduction of a formal leadership qualification for school leaders, but rather suggested the establishment of a National Institute for Education Management Development (Department of Education, 1996:55), the aim of which would be to "operate as a node in a national network of institutions with strong linkages to the provincial education management development initiatives", and would serve as "a national centre for a collection of education management development resources and information" (Department of Education, 1996:56).

This Task team also suggested the creation of a centre for education management development within each of the nine (9) provinces in the country (Department of Education, 1996:43), and currently, each of the nine (9) provincial education departments is responsible for the format and content of its own school leadership programmes, with such in-service training courses for school leaders dating back as far as 1967 (van der Westhuizen & van Vuuren, 2007:433, van der Mescht, 2008:8). However, many of these provincial departments don't have the capacity to implement the strategies that they propose (Mesty & Singh, 2007:478). It was only after the publication of the 2006 Grade 12 results and the then director-general of the former National Department of Education's statement that 2007 would be the year in which school leaders would themselves have to go "back to school" (van der Westhuizen & van Vuuren, 2007:431), that consideration was given to the introduction of a compulsory qualification for principalship. By that date, the former National Department of Education had already initiated a move towards the formal preparation and development of school leaders with the publication of the Draft Policy Framework: Education Management and Leadership Development (Department of Education, 2004), an event that van der Westhuizen and van Vuuren (2007:436) laud as both the turning point and the starting point for South African school leader development and training. This draft policy included clear guidelines for what was called education management development, and was followed by the proposal of a South African National Professional Qualification for Principalship (Department of Education, 2004) and in 2005 by the draft South African Standard for Principalship, the final draft of which was published for comment in August 2014 (Government Gazette No. 37897, 07 August 2014).

Education leadership learning in South Africa is presented, as is all continuing professional development qualifications for educators, in six different qualification types, namely an Advanced Certificate in Teaching, an Advanced Diploma in Education, a Postgraduate Diploma in Education, a Bachelor of Education Honours degree, a Master of Education degree and a Doctor of Education degree (RSA, 2010). Educators wishing to develop as school leaders would thus enroll for an Advance Certificate in Education: School Leadership, for example, or for a Master of Education degree in Educational Leadership - as was the case with the participants in this study - with the level at which an educator enters the field of education

leadership learning being dependent on his or her prior qualifications. These six qualification types are in turn divided by the National Qualifications Framework (NQF) into five levels, as reflected in table 1.2.

Qualification Type	Undergraduate Or Postgraduate	NQF Level
Advanced Certificate	Undergraduate	6
Advanced Diploma	Undergraduate	7
Postgraduate Diploma Bachelor of Education Honours degree	Postgraduate	8
Master of Education degree	Postgraduate	9
Doctor of Education degree	Postgraduate	10

Table 1.2: NQF levels for qualification types Source: Government Gazette No. 36797 of 30 August 2013

Each level is in turn defined and described by a level descriptor which “provide(s) a broad indication of learning achievements or outcomes that are appropriate to a qualification” (SAQA, 2012:5) at any of the NQF levels. These level descriptors each contain a description of learning achievements or outcomes for each level of qualification related to the following themes:

- The **scope of knowledge** expected of a graduate at any given level
- The **knowledge literacy** expected of a graduate at any given level
- Method and procedure, also referred to as **the level of operational or practical literacy** required of the graduate of any given level
- The **level of problem-solving skills** required of a graduate of any given level
- The **level of ethical and professional practice** expected of a graduate at any given level
- The level at which the graduate is expected to **access, process and manage information** at any given level
- The level at which the graduate is expected to **produce and communicate information** at any given level

- The extent to which a graduate, at any given level, is expected to ***understand his or her organisation or operating environments as a system***
- The level at which a graduate is expected to ***learn within a given environment***, and
- The extent to which a graduate is expected to ***contribute to team effectiveness*** (SAQA, 2012:6-7)

It follows then that the levels of expectation or outcomes for different levels of qualifications differ. So for example a graduate of an Advanced Certificate (NQF level 6) can be expected, with regard to the scope of knowledge of that qualification, to “demonstrate detailed knowledge of the main areas of one or more fields, disciplines or practices, including an understanding of and the ability to apply the key terms, concepts, facts, principles, rules and theories of that field, discipline or practice to unfamiliar but relevant contexts; and knowledge of an area or areas of specialisation and how that knowledge relates to other fields, disciplines or practices” (SAQA, 2013:9), while a graduate of a master’s degree (NQF 9) can be expected to “demonstrate specialist knowledge to enable engagement with and critique of current research or practices, as well as advanced scholarship or research in a particular field, discipline or practice” (SAQA, 2013:11).

When considering the main education leadership learning opportunities available to school leaders in South Africa, four qualification types emerge, namely the Advanced Certificate (ACE) (NQF level 6), the Bachelor of Education Honours degree (BEd Hons) and the Postgraduate Diploma (PGDip), both at NQF level 8, and the Master’s degree (MEd) (NQF level 9). It is important to note that, of these four, one - the ACE - is an undergraduate qualification, while the other three are postgraduate qualifications.

As far as the ACE is concerned, it was the Policy Framework: Education Management and Leadership Development in 2004 (Department of Education, 2004) that proposed the implementation of a new entry level (or “threshold” - Bush *et al*, 2001:32) education leadership learning qualification at certificate level (Moloi, 2007:465) as part of the South African National Qualification for Principals

(Department of Education, 2005). This qualification, entitled the Advanced Certificate in Education: School Leadership (ACE:SL), was designed by the former National Department of Education in consultation with various organisations, most notably the National Management and Leadership Committee made up of representatives of the various universities that would eventually present the programme (van der Westhuizen & van Vuuren, 2007:440, Bush *et al*, 2011:34). This ACE:SL, a two year, part-time practice-based programme (Mestry & Singh, 2007:482) was introduced as a pilot programme in six of the nine provinces between 2007 and 2009. Both serving and aspiring principals (deputy principals and other school management team members such as Heads of Department) were nominated for enrollment by the provincial departments of education in this course that was delivered through a number of South African universities (Bush *et al*, 2011:32). Although presented by universities, the ACE:SL was envisaged as a “practice-based” programme at undergraduate level (Mestry & Singh, 2007:482, Bush *et al*, 2011, 32) after the Ministerial Task Team on Education Management (Department of Education, 1996:24) found that even though a number of South African school leaders held degrees in management, the content and methodologies of these programmes was inappropriate and the impact of these graduates on their schools was minimal. This practice-based character of the ACE is confirmed by the recent publication of the Higher Education Qualification Subframework (HEQSF) which states that the ACE is “vocational or industry-orinetated” (Government Gazette No. 36797 of 30 August 2013:47) with the purpose of providing students with “a sound knowledge base in a particular field or discipline with the ability to apply their knowledge and skills to particular careers or professional contexts” (Government Gazette No. 36797 of 30 August 2013:48).

From the preceding discussion it is fair to state that, in keeping with the trend for developing countries suggested earlier, education leadership learning provision in South Africa prior to 2007 focused on *developing* school leaders rather than on *preparing* pre-service educators for the role of school leader. However, the introduction in 2007 of the ACE:SL programme, although initially open to both serving and aspiring school leaders, indicated a shift in this focus away from development and towards preparation. This programme, although currently not yet a requirement for appointment to a school leadership position, is still being offered by a number of

South African universities, among them the University of the Free State and the North West University.

With regard to the delivery of education leadership learning programmes other than the ACE:SL, Van der Westhuizen and van Vuuren (2007:433) report that in 1980, six South African universities offered formal programmes in education management. A review of university websites in early 2015 revealed that of the twenty three universities in South Africa, twelve offer a BEd Honours degree in education leadership and/or management and nine of them offer between them a total of thirteen programmes at master's level in education leadership and/or management, one of which serves as the activity system for this study.

Whereas the ACE, as mentioned earlier, is a vocational or industry-orientated qualification, the PGDip aims to “strengthen and deepen the student’s knowledge in a particular discipline or profession” so that that student can “undertake professional or high-skilled work” (Government Gazette No. 36797 of 30 August 2013:71). The BEd honours programme on the other hand, although rated at the same NQF level (8) as the PGDip, is a postgraduate specialisation qualification aimed at preparing students for research-based postgraduate studies, whilst deepening their knowledge and expertise in a particular discipline with a high level of theoretical and intellectual engagement (Government Gazette No. 36797 of 30 August 2013).

The purpose of the master’s degree at NQF level 9 which follows the honours degree is “to educate and train researchers who can contribute to knowledge at an advanced level” (Government Gazette No. 36797 of 30 August 2013:72). The descriptions of the purposes of these four qualifications clearly shows the progression intended, i.e. from a sound knowledge base with the ability to apply such knowledge in practice (ACE) to a deepening of that knowledge and expertise in a given field in order to either engage in skilled employment (PGDip) or as a preparation for research and research-based qualifications (BEd Honours) to the creation of knowledgeable researchers who not only know their field, but are also able to contribute to that field through research (MEd).

The four levels of education leadership learning represented by these four South African qualifications will come into play again later in this thesis during the discussion of the ideal level for education leadership learning. In conclusion though, it is interesting to note the position of Heystek (2007:501) that the direct involvement of government in the development of South African education leadership learning programmes such as the ACE:SL signifies an attempt by the government to maintain control over education despite the decentralisation prescribed by globalisation and its concomitant prescription of neo-liberal, market-driven and market-related economic policy.

#### 1.2.5.5 Educational Leadership Programme Selected as the Research Site

The master's degree programme in educational leadership selected for this study was developed by its host institution in response to the call from the Ministerial Task Team on Education Management Development (1996:55) for a national initiative for leadership and management training, and was offered for the first time in 2004 as an academic degree aimed at school leaders (both principals and aspiring principals) who had completed the equivalent of an honours degree in education. The aim of the programme at its inception was to provide development opportunities for educational leaders to the same standard as those offered in countries such as the United States of America, the United Kingdom and Australia. The programme was developed in cooperation with academics in the field of education leadership in England and the United States of America, and differs from other generic master's degrees in education management offered by a number of other South African universities in that it was developed to address the specific needs of serving as well as aspiring school leaders by enabling them, through the course work and research / dissertation components, to become skilled in both the theory and the practice of both education leadership and academic research.

Although the master's degree programme in educational leadership selected for this study has been revised and amended in recent years in response to changes in both the field of education leadership and changes in education leadership in South Africa, it remained, during the years on which this study focuses (2008 - 2010), a course work master's level programme at NQF level 9 consisting of six (6) education

leadership-related modules and an approved education leadership-focused research project reported on by means of a dissertation of limited scope. All of the students who enrolled for this programme between 2008 and 2010 were employed full-time as educators, school leaders or education district officials, and could therefore be described as part-time students. Modules were presented over the first eighteen (18) months of each cohort's enrollment, with contact sessions for the six (6) modules scheduled on Saturdays and/or during school vacations. Between 2008 and 2010 the University prescribed a minimum completion time of two (2) years and a maximum completion time of four (4) years. The members of the classes of 2008, 2009 and 2010 who acted as participants in this study are described in greater detail in Chapter 6.

In conclusion, it must be stated unequivocally at this early stage in the thesis that this programme was selected - in line with the purposes of the study, namely to investigate and describe the experiences and perceptions of students of a master's degree level education leadership learning programme of their own education leadership learning - to serve merely as the activity system for this study, and not to be evaluated or assessed or to be compared with other similar programmes.

### **1.3 Problem Statement**

Recent international concern among policy-makers and researchers has focused on the nature and characteristics of education leadership learning that contributes most significantly to better school leaders and therefore to school improvement (Orphanos & Orr, 2014:682). And yet, despite the fact that, as Bush (2012:7) contends, "developing leaders should be a deliberate, not an inadvertent, process, designed to enhance leadership learning and skills", Crawford and Early (2011:107) believe that:

*"exposure to and participation in leadership development activities may or may not bring about change to individual leaders' beliefs, values, attitudes and behaviours, and these changes to the individual may or may not lead to changes in the leadership practice and these changes may or may not lead to an improvement in student outcomes."*

If in fact improved education leadership and management at all levels of an education system contributes to better quality education within that system (Steyn, 2008:889, Robinson *et al*, 2008:637, Orr, 2011:2), then education leadership learning that improves school leaders' leadership practice is essential for the improvement of education, not only in South Africa, but world-wide. Orr and Orphanos (2010:30), based on a review of the findings of studies focusing on the influence of education leadership learning on schools, conclude that there exists a positive relationship between quality education leadership learning programmes and (a) leadership knowledge, (b) effective leadership practices and school improvement, and (c) the establishment of a positive and enabling school climate. They state that it is fair to assume that quality education leadership learning contributes positively to school leaders' leadership practices, and that this positive influence in turn positively influences the quality of schools and the performance and success of the learners enrolled at schools (Orr & Orphanos, 2010:21). However, a number of authors in the field of education leadership learning, both internationally (Crawford & Earley, 2011:107, Orr, 2011:115) and in South Africa (van der Westhuizen, Mosoge & van Vuuren, 2004:715, Bush, 2012:4) indicate that such programmes do not have the kind of impact on practice that is required to make significant improvements in education.

In summary, although research has incontrovertibly established a link between effective school leadership and improved school and learner performance, recognition of the need for specific education leadership learning, whether in the form of preparation for pre-service school leaders or in the form of development for already serving school leaders, has been "slower to emerge" (Bush & Jackson, 2002:418), and even though there may be consensus that the role of school leaders matters and that education leadership learning is important, there remains considerable disagreement, both philosophical and political, about what kinds of school leaders are needed for the modern age, what skills and attributes they should have and how, ideally, they should be prepared and developed for their roles as school leaders (Crawford & Early, 2011:108).

The problem therefore that lies at the core of this study is the fact that international and local literature suggests that education leadership learning programmes and

qualifications, although considered vital for the development and improvement of school leaders and school leadership and thus for the improvement of learner and school outcomes and education in general, are not effective in improving the leadership practices of school leaders at the chalk face.

## 1.4 Rationale for the Study

The rationale for this study can be described as two-fold in that the reasons for the researcher's interest in the experiences and perceptions of master's students of their own leadership learning are both academic and personal/professional. The academic rationale for the study stems from four sources – the first being Crow *et al* (2008:2) and their belief that if, as has been indicated in the preceding paragraphs, both leaders and leadership are indeed important in education – that leaders and leadership *matters* (Eacott, 2013:686) - then researchers should be deeply interested in and concerned about “how leaders learn to do their jobs”, and the second being the statement by Bush and Moorosi (2011:59), in their overview of education leadership learning in the countries of the Commonwealth, that “researchers should continually be asking critical questions about how school leaders are being prepared, what type of leadership development they receive and what impact that training has”. The third source of the researcher's interest in studying the experiences and perceptions of master's students of their own education leadership learning is Orr and Orphanos's (2010:20) statement that, with all the attention that education leadership learning has attracted in the first decade of this millennium, there is an expectation that such learning can “positively influence leaders' work and their schools' efforts to improve student (learner) achievement”. The fourth and final source for the researcher's interest in the experiences and perceptions of master's students of their own education leadership and learning is the statement by Zhang and Brundrett (2010:154) that, “by exploring (school leader's) learning experiences as perceived within varied contexts”, we can cast some light on the debate surrounding the location and format of education leadership learning, and in so doing, increase the confidence of researchers and academics, especially in South Africa, that the research base in the field of education leadership will increasingly do justice to the nature of this field and the complexity and ambiguity of the concepts central to it (Christie, 2010:698) .

The researcher finds this deep concern for and interest in education leadership learning (Lumby *et al*, 2008:2) and the asking of critical questions about this phenomenon (Bush & Moorosi, 2011:59), together with the expectation that such learning can make a difference to school and learner achievement (Orr & Orphanos, 2010:20), especially significant in the light of the findings of some South African and international studies into the influence of education leadership learning opportunities at all levels - workshops, short courses, diploma- and certificate courses and postgraduate programmes - on the school leaders who participated. A number of these studies suggest that participation in such education leadership learning activities does not always have the kind of influence that Crawford and Early (2011:107) and Orr (2011:115) suggest they should have.

So for example, Orr (2011:2) states that postgraduate programmes in the United States of America fall short of having the desired influence on educational leadership because of their lack of quality and academic rigour, their dated curricula and content and the inappropriate nature of their pedagogy and modes of delivery, while Van der Westhuizen *et al* (2004:715) – reporting on the delivery of education leadership learning in the Mpumalanga province of South Africa - state that such learning could only be considered partially successful, based on the participants' views that aspects such as strategic planning, time management and the management of change had not been dealt with sufficiently to make a difference at school level. Bush and Oduro (2006:365), reporting on a study among master's students of an educational leadership programme, report that these students expressed both satisfaction and dissatisfaction with aspects of their education leadership – while they were satisfied with the treatment afforded issues such as the management of teaching and learning and the management of human resources in the field of education, they expressed dissatisfaction with the treatment of issues such as the management of school finances and facilities.

On the personal and professional level, in his role as a lecturer at the university where the educational leadership programme is offered, the researcher is involved in various courses and modules in both the BEd (honours level) and MEd (master's level) programmes focusing on education leadership. He is also a graduate of this

specific educational leadership programme and experienced the programme as a watershed in the development of his own identity and practice as a school leader. It is this involvement in this programme, both as a student and more recently as a lecturer, together with the urging of authors such as Lumby *et al* (2008:2) and Bush *et al* (2011:59) to be concerned for and ask critical questions about education leadership learning, that has sparked his interest in investigating the experiences and perceptions of master's students of their own education leadership learning.

Finally, as Paterson and West-Burnham (2005:108) point out, there appears to be “a dearth of evidence about what (education leadership) learning is effective. The researcher posits that if this study can contribute to the research on what constitutes effective education leadership learning, and the relationship of such learning to the various theories of effective learning, then that would be rationale enough.

## **1.5 Purpose of the Study**

The purpose of this study was to understand and describe the experiences and perceptions of master's students of their own education leadership learning while enrolled in a postgraduate educational leadership learning programme, with the programme identified for this study being a master's degree programme in educational leadership offered at a South African university. As part of this purpose, the study sought to enhance its understanding of their experiences and perceptions by investigating three aspects which could conceivably have had an influence on those experiences and perceptions, namely (a) the aspects of the programme that the master's students experienced and perceived as having made the greatest contribution to their own education leadership learning, (b) the aspects of the programme that the master's students experienced and perceived as having acted as barriers to their education leadership learning and (c) the master's students' experiences and perceptions of the contribution their education leadership learning during the programme had made to their own education leadership practice.

It is essential at this juncture to again indicate clearly and unequivocally that the study did not plan to evaluate or assess the education leadership learning programme selected for the study, or indeed to compare its features or curriculum

with those of other South African or international programmes for the purposes of evaluation. Rather, the purpose of the study, as stated earlier, was to investigate and understand the experiences and perceptions of students of the programme of their own learning and the contribution, if any, of the programme to their own leadership and management practice. As will be made clear in the section detailing the Activity Theory (Engeström, 1987:78) as the theoretical framework selected for this study, the selected programme serves merely as the activity system within which the researcher was able to investigate and describe the experiences and perceptions of the students of their own learning, and not as the primary focus of the study. From this it then follows that any mention of the features and or/ curriculum of other local and international programmes focused on matters and information related to the experiences and perceptions of students of such programmes of their own education leadership learning, and therefore ***served merely as a tool to compare the experiences and perceptions of the students***, and not as a tool to compare programmes.

This study drew its data from students of the selected programme's classes of 2008, 2009 and 2010, and, by means of semi-structured interviews, delved deeply into the master's students' experiences and perceptions of their own education leadership learning during their participation in the programme.

## **1.6 Research Questions**

Given the purpose of this study set out in paragraph 3 above, the study sought to address the following primary and secondary research questions:

### **1.6.1 Primary Research Question**

What are the experiences and perceptions of master's students enrolled in a master's degree programme in educational leadership of their own education leadership learning?

### **1.6.2 Secondary Research Questions**

- a. Which aspects of the master's degree programme in educational leadership do master's students perceive as having made the greatest contribution to their own education leadership learning?
- b. Which aspects of the master's degree programme in educational leadership do master's students perceive as barriers or challenges to their own education leadership learning?
- c. What are the master's students' experiences and perceptions of the contribution of their own education leadership learning to their leadership practice?

## 1.7 Theoretical Framework for the Study

Gay *et al* (2014:66) define theory as “an organised body of concepts, generalisations and principles that can be investigated”. However, Denscombe (2003:301) cautions that, in the social sciences, including the field of education, the idea of theory must be treated with greater caution than is done in the natural sciences because of the fact that human beings, unlike elements of materials in the natural sciences, respond individually and often unpredictably to situations and events. This is true of the uniquely human activity of education leadership learning – people experience and perceive an activity such as education leadership learning individually, with no two person's experiences and perceptions exactly matching those of another. Neither does each person's education leadership learning take place in a vacuum or as an activity unrelated to or disconnected from other activities and people. It is therefore of cardinal importance in a study aimed at understanding and describing master's students' experiences and perceptions of their own education leadership learning to select a theoretical lens that has a proven track record in educational or learning activity research.

For this study the researcher selected what Hardman (2008:379) refers to as the third generation Human Activity Theory (commonly and hereafter also referred to as the Activity Theory - AT) developed by Engeström (1987:78) from the original work of Vygotsky. Vygotsky posits that man uses what he calls “meditational means or tools”

such as speaking, writing, gestures and machines in order to shape and change his world, and that man himself is then transformed by the use of these tools (Hardman, 2008:380). Engeström's Activity Theory (1987:78) understands the act of learning as the transformation of the learner and his world rather than simply a transmission of knowledge about the world to the learner (Hardman, 2008:380), and assumes that all human activity is contextualised within a specific historical and or social context (Scheckle, 2014:608).

Although Engeström's Activity Theory (1987:78) is most often applied to the field of human computer interaction (the manner in which humans use and interact with and are transformed by computers during the learning process – Hardman, 2008:368), it has been applied successfully *to inter alia* the study of students' experiences and perceptions of their doctoral studies (Beauchamp, Jazvac-Martek and McAlpine, 2009), the study of beginner teachers' experiences of their participation in mathematics intervention programmes (Pather, 2012) and the study of reasons for student absenteeism in South African universities (Scheckle, 2014). From a review of these studies, it is clear that the basic elements and principles of this theory can be applied to any learning situation where the researcher needs to pose and answer questions related to a learning activity or learning context (Hardman, 2008:381) or would like to “develop an understanding of the complex roles and relationships in learning situations” (Beauchamp *et al*, 2009:267). A detailed description of both the applicability and application of this theory to the study being reported on here can be found in Chapter 2.

## **1.8 Research Methodology**

### **1.8.1 Research Paradigm and Approach**

The paradigm within which a research study falls depends on the epistemological and ontological beliefs of the researcher (Cohen, Manion & Morrison, 2011:6, Bryman, 2012:32). Epistemology describes the researcher's beliefs about the nature and form of knowledge in a specific field, while the ontology of a study describes the researcher's position on what constitutes reality (Cohen *et al*, 2011:17). This study falls within the interpretivist-constructivist paradigm (McMillan & Schumacher,

2014:14), based on the fact that (a) the study focuses on *understanding, describing and interpreting* the master's students' experiences and perceptions of their own education leadership learning rather than on *explaining* the human activity of education leadership learning (Cohen *et al*, 2011:17, Bryman, 2012:28), and (b) this paradigm is substantiated by the researcher's belief that reality is constructed rather than objective (Bryman, 2012:33), and that education leadership learning students construct their own reality as they participate in the activity of education leadership learning.

The epistemological and ontological positions of the researcher prescribe a qualitative approach for this study (McMillan & Schumacher, 2014:8). This approach was selected because of its usefulness for understanding and describing a variety of human activities within a variety of contexts. It does so by collecting the detailed views, experiences, descriptions and perceptions of participants, which then allows the researcher to identify and describe particular themes that emerge or the particular characteristics of a phenomena within a specific context (Creswell, 2014:11, 263). In relation to the study being reported on here, the researcher sought, through a qualitative approach, to understand and describe the experiences and perceptions of master's students of their own education leadership learning within the context of the educational leadership master's degree programme identified for this study.

The epistemology and ontology of the study as well as the choice of the qualitative research approach now in turn prescribe the research design and data collection methods to be employed.

### **1.8.2 Research Design**

This study was conducted using a case study design – this design was selected because the phenomenon of leadership learning as it presents itself in the selected master's degree in educational leadership programme makes for a good case or “study of an instance in action” (Cohen *et al*, 2011:289) which also provides for the use of sources of data found within the system or context itself (McMillan & Schumacher, 2014:32). The case study design was deemed appropriate for this study because of its ability to investigate, comprehensively describe and understand a phenomenon and the particular context within which it is found.

In investigating the experiences and perceptions of masters' students of their own leadership learning while enrolled for a master's degree in education leadership, the case study design proved to be the perfect design for the study of the phenomenon of education leadership learning within the community of students who make up the context (or activity system in Activity Theory parlance), namely the selected master's programme's classes of 2008, 2009 and 2010.

### **1.8.3 Sampling, Access and Research Sites**

For the purposes of this study, all students who registered for the selected master's degree programme in educational leadership in 2008, 2009 and 2010 were considered for participation. The sample for this study was thus selected purposively, because the researcher "handpick(ed) the cases to be included" (Cohen *et al*, 2011:156) in order to build up a sample that met his specific needs. Out of the classes or year groups mentioned above, fifteen (15) participants were eventually selected to participate in the study. Possible participants were identified via their university student records and were initially invited telephonically to participate in the study. The initial telephonic contact was followed up with a more detailed written communication containing all the details of the study, including the purpose of and rationale for as well as the scope of the study, how the participants were selected and what the study would require from each participant.

All the field work for this study was conducted at venues and locations suggested by and convenient for the participants. Permission for the study and for access to the student records and contact details of potential participants was requested and obtained from the university that houses this programme.

### **1.8.4 Data Collection**

The data collection method employed for this study was the semi-structured interview. These interviews were conducted in order to generate "field texts" (Cohen *et al*, 2011:412). These field texts represented the entirety of the raw data collected for this study, and were analysed by the researcher in order to understand and describe the participants' experiences and perceptions of their own education leadership learning.

The semi-structured interview, as opposed to the standardized open-ended interview format, was selected because it was felt that this type of interview “increases the comprehensiveness of the data” (Cohen *et al*, 2011:413) by allowing opportunities for the researcher to prompt interviewees for further information and ‘deeper’ responses (Nieuwenhuis, 2007:87), which in turn allows the researcher to collect data on how individuals make meaning of- and conceive their world and “make sense of the important events of their lives” (McMillan & Schumacher, 2014:381), the event in this case being their own education leadership learning.

An interview protocol (Creswell, 2014:247) was developed according to the basic outline of selected elements of Engeström’s Activity Theory (1987:78), these elements being tools and artefacts, rules, community and division of labour. A copy of the interview protocol appears at the end of this thesis as annexure B.

### **1.8.5 Data Analysis**

Data analysis is the process of “organising, accounting for and explaining the data” (Cohen *et al*, 2011:537) that needs to suit the purpose and context of a particular study and, in qualitative research, is primarily an inductive one (McMillan & Schumacher, 2014:395). The data analysis process followed the framework suggested by both Nieuwenhuis (2007:103-113) and Creswell (2014:261), namely

(a) data preparation and organising – transcribing the interviews and re-organising the data into the categories pre-determined from Engeström’s Activity Theory (1987:78), that is tools and artefacts, community, rules and division of labour,

(b) data coding - careful, line-by-line reading and re-reading of the data in order to create a mental picture of the whole (Creswell, 2014:268), and then assigning unique codes to significant or meaningful parts or segments of the data (McMillan & Schumacher, 2014:398),

(c) establishing categories and themes and re-organising or re-structuring the data – recognizing the emergence from the coded data of both sub-categories within the pre-determined categories and also a number of new categories,

(d) analysing and interpreting the data – using content analysis as an inductive means of looking at the data from different angles in order to understand and interpret it (Nieuwenhuis, 2007:101), and finally

(e) presenting the data and findings – arranging and presenting the data and findings by theme or topic (Cohen *et al*, 2011:537) based on the use of content analysis as the data analysis strategy and its allowance for the use of both pre-determined categories and for the emergence of new categories during the coding phase.

The researcher elected to conduct hand analysis as opposed to computer software-assisted analysis of the data based on the suggestion by Creswell (2014: 265) that this method is more suitable to studies with fewer than 500 pages of typed data where the researcher has been intimately involved in the data collection process and wishes to remain close to the data and the final result of the study.

### **1.8.6 Trustworthiness of the Study**

The researcher employed member checking (both formally after the completion of the transcripts - Bryman, 2012:273, McMillan & Schumacher, 2014:355, and informally during the actual interviews - Creswell, 2014:283, Cohen *et al*, 2011:185) to establish trustworthiness and credibility for the study. Together with this, the researcher also requested feedback from two participants about the extent to which the categories and themes identified and the finding presented in the final report stem from and are substantiated by the data collected. This was done in an effort to confirm the crystallisation (Nieuwenhuis, 2007:81) of the findings out of the data. The researcher, in planning for the selection of participants for his study, heeded the advice of Maree and Pietersen (2007:178) who suggest that the selection of a larger proportion of a small population increases the trustworthiness and credibility of a study. In this regard, the researcher aimed to select between twelve (12) and twenty (20) of the overall population of twenty-seven (27) master's students in the classes of 2008,

2009 and 2010. Ultimately, interviews were conducted with fifteen (15) participants, amounting to more than half of the overall population.

The researcher, during the design phase of the study, identified both his own role as the researcher and two other types of bias, namely self-reporting bias and mono-method bias (Donaldson & Grant-Vallone, 2002:248), as potential threats to the trustworthiness of the study. He therefore sought to minimize the effects of his own subjective role in the study by the use of a reflex log and auditability (McMillan & Schumacher, 2014:358-359). In order to reduce the biases inherent in self-reporting and mono-method research, the researcher measured the study against the three factors suggested by Donaldson and Grant-Vallone (2002:248) that determine the extent to which the use of self-reporting and only one research method will affect the trustworthiness of a study, namely the nature and sensitivity of the phenomenon or topic being studied, the disposition of the participants - how likely are they, given the topic being investigated and the data collection instrument being used, to give or to feel obliged or forced to give, socially desirable answers in order to “look as good as possible” (Donaldson & Grant-Vallone, 2002:247), and the situational characteristics of the study - how much pressure is there within the context of the study to give socially desirable answers? After careful consideration, the researcher posits that although self-reporting bias and the use of only one method of data collection can be a challenge to the trustworthiness and reliability of a study, two factors, namely the data collection instrument (interview protocol) and the non-sensitive nature of the topic, minimize the impact of these two biases on the study under discussion. These two factors, together with the fact that, after careful consideration, no triangulating second data collection method or strategy could be identified that would serve to answer the primary or secondary research questions on masters’ students’ experiences and perceptions of their own education leadership learning from their own perspective (McMillan & Schumacher, 2014:347), minimize, in the opinion of the researcher, the effect of the biases mentioned above.

## **1.9 Ethical Considerations**

The ethical issues surrounding this study revolve around two key issues – informed consent (Gay *et al*, 2014:16, Creswell, 2014:166, McMillan & Schumacher, 2014:130)

and access and acceptance (Gay *et al*, 2014:22, Cohen *et al*, 2011:81, Creswell, 2014:252). As mentioned earlier, access to the students of these classes was gained via their university student academic and contact detail records after (a) permission to conduct a study involving the students of one of the selected university's postgraduate programmes and (b) access to student academic and contact detail records had been granted by the university.

Telephonic contact was then attempted with all twenty-seven (27) of the possible participants in order to introduce both the researcher and the research study, and to determine each possible participant's willingness to participate. Those possible participants who then indicated such willingness – twenty-four (24) in all - received detailed written communication (see annexure A) regarding the study which included *inter alia* the following: the purpose of the study, the risks involved, the general procedures for and timeline of the study, details regarding the confidentiality of data gathered during the course of the study and the measures to ensure their privacy and anonymity, the rights of all participants in the study – these include the fact that each participant is acting in a voluntary role and may withdraw from the study at any time without any penalty or any adverse effects. Ultimately, each of the fifteen (15) students who then agreed to participate in the study signed a letter of consent indicating that they would participate freely and voluntarily.

### **1.10 Limitations and Challenges of the Study**

Maree and van der Westhuizen (2007:65) indicate that it is of the utmost importance to recognise any challenges or limitations that may affect a research study. One limitation of this study has been its scope - this study was limited to one master's level educational leadership programme, and therefore the findings and conclusions reached or the recommendations made may only be of limited application or use to other such programmes.

It is also important to note that the study's reliance on self-reporting and on a mono-method approach may be construed as a limitation – the manner in which the researcher addressed these limitations is detailed in Chapter 5.

The fact that the participants from the class of 2008 completed the core modules of the educational leadership programme more than five (5) years prior to their participation in this study also posed a challenge – the effects of this relatively long passage of time became apparent and were managed appropriately at the time of the interviews.

### 1.11 Outline of the Thesis

Chapter	Title	Description
1	Introduction and orientation to the study	This chapter 'paints the scene' and gives an overview of the study and what the reader can expect in the chapters that follow
2	Theoretical framework	This chapter details the theoretical framework used to frame the study and in the analysis of the data.
3	Education leadership learning – concepts and current discourse	This chapter focuses on the concepts important to the study and reviews the current discourse in the field of education leadership learning.
4	Education leadership learning – theories of learning and ideal practice	Chapter 4 focuses on the link between education leadership learning as a learning activity and the various theories of learning, and between these theories and how education leadership learning is and should be done, both nationally and internationally.
5	Research approach and methodology	This chapter presents the research paradigm, design and methodology used to collect and analyse the data, as well as the ethical issues and limitations of the study.
6	Findings	Chapter 6 presents the findings of the study.
7	Overview, recommendations and conclusions	The findings are discussed, and the recommendations from and contribution of the study is presented. This chapter also provides an overview of the study.

Table 1.3 – Outline of the thesis

## 1.12 Summary

In summary, this opening chapter lays the foundation for a comprehensive report on the researcher's investigation into the experiences and perceptions of master's students of their own education leadership learning as students of a masters' degree programme in educational leadership offered at a South African university. The concept of education leadership learning was defined, and the rationale for the study as well as the purpose of the study and the research questions were presented by way of introduction to the study.

This chapter then laid out the foundations of Engeström's Activity Theory (1987:78) as the theoretical framework that guided the study and presented a brief explanation of the research methodology chosen for the study, including the research paradigm and approach, the research design, the data collection method and sampling. The issue of trustworthiness and credibility as well as the ethical considerations and the limitations of the study were introduced, and finally, the possible contribution of the study was highlighted.

## CHAPTER 2

### The Theoretical Framework of the Study

#### 2.1 Introduction

This chapter describes the theoretical framework selected for this investigation into the experiences and perceptions of master's students of their own education leadership learning - this theory being the third generation Human Activity Theory (commonly and hereafter referred to as the Activity Theory - AT) developed by Engeström (1987:78) from the earlier work of Vygotsky. The Activity Theory explains the act of learning from within “a framework in which individuals act on objects through social and cultural artefacts that include language, norms and modes of behaviour, to achieve specific learning outcomes” (Leonard, 2002:176). This theory understands the act of learning as the transformation of the learner and his world rather than simply a transmission of knowledge about the world to the learner (Engeström, 1987:78, Hardman, 2008:380), and assumes that all human activity is contextualised within a specific historical and / or social context (Scheckle, 2014:608, Schunk, 2012:242). In this chapter the researcher will identify the main unit of analysis as well as the elements of Engeström's Activity Theory (1987:78) and will describe this unit of analysis and these elements in relation to the study being reported on here.

#### 2.2 Engeström's Activity Theory

Engeström's Activity Theory (1987:78) has been applied successfully to studies similar to the one being reported on here that focused on learning activities, among them a study of students' experiences and perceptions of their doctoral work (Beauchamp *et al*, 2009), the study of beginner teachers' experiences of their participation in mathematics intervention programmes (Pather, 2012) and the study of reasons for student absenteeism in South African universities (Scheckle, 2014). From a review of the studies mentioned above it is clear that the Engeström's Activity Theory (1987:78) can be applied with some success to learning situations or activities where the researcher needs to pose and answer questions about the

relationships between different elements of a learning activity (Hardman, 2008:381, Beauchamp *et al*, 2009:267).

Diagram 2.1 below illustrates the elements of the Engeström’s Activity Theory (1987:78) as they relate to learning and also indicates the interaction and interdependence of the various elements involved in a specific learning activity such as education leadership learning (Pather, 2012:254).

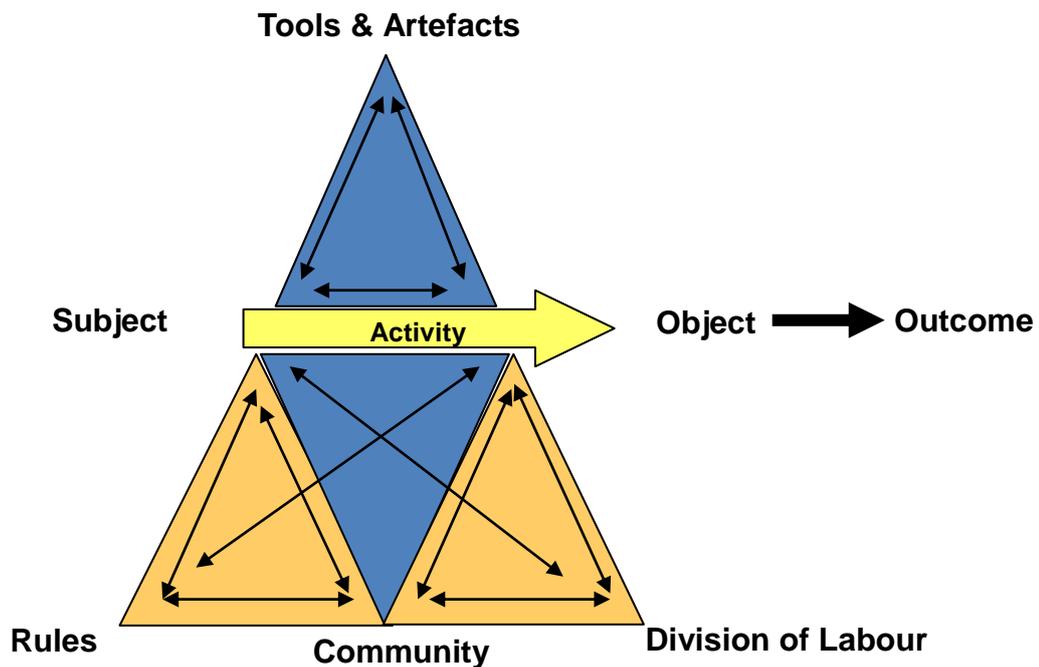


Diagram 2.1 - Elements of the Activity Theory adapted from Engeström (1987) and Hardman (2008)

The main unit of analysis used in Engeström’s Activity Theory is an activity system (Engeström, 1987:78, Pather, 2012:255). Hardman (2008:85) defines an activity system as “a group of people or a community who share a common objective and who use tools to act on that object, transforming it.” Within the activity system, the subject is the point of focus – this subject uses certain tools to attain the objective, which is the central outcome towards which the activity is directed. Within every activity system there are (a) rules that guide and constrain the actions within that system and (b) a community made up of individuals “who share the same overall objective” (Pather, 2012:255). Each member of the community is also a subject in his or her own activity system. Pather (2012:255) describes the Activity Theory (Engeström, 1987:78) as a flexible lens that enables the researcher to focus his or

her attention on different elements and at different levels of an activity system in order to see the interaction and inter-relationship between these various elements of that activity system.

For the purposes of this study, the activity system is a master's degree programme in educational leadership offered by a South African university. Individual master's students are each a subject of this activity system, but at the same time are also members of the community of this activity system. These master's students use the tools and artefacts of this activity system – the course work modules, text books and other learning material to attain the object, which for this activity system is education leadership learning. The pursuance of the object of education leadership learning by the master's students is both promoted and constrained by the rules of the programme. In addition, the individual subjects as well as the community interact with and are influenced by the final element of Engeström's Activity Theory (1987:78), namely the division of labour. This element indicates the tasks and responsibilities of the various role players in the education leadership learning activity system, including those of the students themselves, lecturers, study supervisors and administrative staff.

At this point a closer look at each of these elements is warranted.

### **2.2.1 Subject(s)**

The subject is the focal point of any activity system (Pather, 2012:255). Together with tools and artefacts, the subject plays an important part in Engeström's Activity Theory's (1987:78) explanation of the act of learning. The subject or subjects in this study were the individual master's students who participated in the selected master's degree programme as members of the classes of 2008, 2009 and 2010 (Scheckle, 2014:610). The selection of these students as participants in this study is described in detail in Chapter 5. This study sought to understand and describe their experiences and perceptions of their own education leadership learning by understanding and describing their interaction with- and inter-relationship to the other elements such as the tools and artefacts in the activity system and the rules applicable to that system, as well as to the community (other students, lecturers and supervisors) within the activity system.

### 2.2.2 Object and Outcome

The object of any activity system is closely linked to the outcome that the system aims to achieve (Hardman, 2008:380). For this study the *object* of the education leadership learning activity system as it presented itself in the selected master's degree programme in educational leadership is education leadership learning, previously defined in Chapter 1 as the broader context of all formal, planned, articulated and relevant learning activities and content that take place in or is presented as part of a formal course of study or programme aimed at the expansion of education leaders' knowledge, capacities and skills in order to increase their effectiveness as education leaders.

Because Scheckle (2014:615) posits that the *outcome* of an activity system is "to acquire knowledge, skills and values and a new identity", the outcome for the education leadership learning activity system can be described as the acquisition of the education leadership knowledge, understanding and skills required to be an effective education leader, one who, according to Bush (2012:5) is able to build a vision for- and set the direction of a school, understand and develop people, redesign and develop the school as an organisation and lead the teaching and learning programme at the school. This study sought, through research sub-questions 1 and 2, to understand and describe the students' experiences and perceptions of the object (education leadership learning) and, through research sub-question 3, the outcome (effective education leadership practice) of the education leadership learning activity system by investigating the interaction and inter-relationship of the students as subjects of this activity system with all the other elements (tools and artefacts, community, rules and division of labour) of the activity system.

### 2.2.3 Tools and Artefacts

As alluded to previously, the tools and artefacts in the education leadership learning activity system at the centre of this study are education leadership modules, their content and structure, readers, study guides, lectures, PowerPoint presentations and all the other material used during the presentation of these modules, as well as the assessments, modes of delivery (how the modules are presented) and the use of ICTs by both the students and the members of the activity system community (fellow

students, lecturers, supervisors and administrators) involved in the programme (Scheckle, 2014:611).

As mentioned in Chapter 1, the master's degree programme in educational leadership selected to serve as the education leadership learning activity system for this study as it was presented to the classes of 2008, 2009 and 2010 consisted of

- (a) a coursework component made up of six (6) modules containing content related to various education leadership themes (leading the process of learning in education, leading and managing both human and financial resources in education and aspects of education law) and also research themes (the methodology of research in education and the nature and impact of globalisation on education) and
- (b) a research component with the production of a dissertation of limited scope as the outcome.

It is interesting to note here the correlation between the content of the course work modules of the selected programme and the results of Bush and Moorosi's (2011:69-70) 2011 study on the content of education leadership learning programmes across ten Commonwealth countries, where they reported that the following foci and content was found to be similar across the ten countries studied - (a) school improvement and effectiveness, (b) leadership for- and of learning, (c) effective leadership and management, (d) team leadership, (e) leadership and management theory, (f) human resource management, (g) education policy and law, and (h) financial management.

This study sought to understand and describe the interaction and inter-relationship between the master's students as the subjects of the education leadership learning activity system and various aspects of the tools and artefacts of that activity system, in order to understand and describe their experiences and perceptions of this interaction and inter-relationship as part of their own education leadership learning.

### **2.2.4 Rules**

The rules of the education leadership learning activity system as it presented itself in the selected master's degree programme in educational leadership included all the rules, practices, culture and traditions of that programme (Hardman, 2008:73, Scheckle, 2014:616). These included *inter alia* the rules, practices, culture and traditions concerning for example contact session attendance, assessment / task/ assignment completion and submission, communication among students and with lecturers. This study sought to understand and describe the students' interaction and inter-relationship as subjects of this activity system with the rules of the system, and how this interaction and inter-relationship influenced their experiences and perceptions of their own education leadership learning.

### **2.2.5 Community**

The community of any activity system comprises all those individuals within the system who are moving towards the same objective (Pather, 2012:255). In the activity system at the centre of this study, the community consisted of the collective of students who make up the various classes or year groups within the selected master's degree programme in educational leadership, i.e. the class of 2008, 2009 and 2010. Although not all the students in a specific class or year group participated in this study, the fact that they interacted with those who are participants makes them a part of the community for this system. This study sought to understand and describe that interaction and the inter-relationship between the subjects and the community and the manner in which the community contributed to the experiences and perceptions of the subjects of their own education leadership learning.

### **2.2.6 Division of Labour**

The division of labour within an activity system refers to "how the object of the activity relates to the community and refers to both the horizontal division of tasks between members and the vertical division of power and status" (Pather, 2012:255). The different roles and functions of all the participants in the selected master's degree programme in educational leadership including the students as subjects and as members of the community (the horizontal division of labour) and the lecturers, study supervisors and administrative staff (vertical division of labour) constitute the element of the activity system entitled division of labour for this study (Scheckle, 2014:617).

This study sought to understand and describe the interaction and inter-relationship between the subjects (master's students) and the horizontal and vertical divisions of labour as part of these students' experiences and perceptions of their own education leadership learning.

## **2.3 Summary**

In summary, this discussion of the selection and application of Engeström's Activity Theory (1987:78) to this study of the experiences and perceptions of master's students of their own education leadership learning commenced with an illustration of this theory as a flexible lens that provides researchers with the opportunity to direct their attention to different aspects or elements of an activity such as education leadership learning in order to understand and describe the interaction and inter-relationship between these aspects or elements (Pather, 2012:255, Scheckle, 2014:612).

For the purposes of this study, the activity system has been identified as a selected master's degree programme in educational leadership offered by a South African university, with individual master's students of selected classes of that programme being both the subjects and forming the community of this system. These students use various tools and artefacts present within the system in pursuance of both the object (education leadership learning) and the outcome (effective education leadership practice) of the system. Their pursuit of the object and the outcome is both promoted and constrained by sets of rules within the activity system itself. Their pursuit is also influenced by the horizontal (among students) and vertical (lecturers and supervisors) division of labour.

This study sought, through the application of Engeström's Activity Theory (1987:78) to this master's degree programme in educational leadership as an activity system, to understand and describe the interaction and inter-relationship between the various elements of the system and their influence on the experiences and perceptions of master's students in that programme of their own education leadership learning.

Finally, it must be noted that Engeström's Activity Theory (1987:78) as framework for the study was also selected in order to serve two secondary but equally important purposes, the first being to serve as a guide for both the review of literature in the field of education leadership learning presented in Chapters 3 and 4 and the development of a data collection instrument that would cover all the aspects of the activity of education leadership learning discussed in detail in Chapter 5. The second purpose was to provide pre-determined categories for use during the data analysis phase of the study, these categories being selected elements of the Engeström's Activity Theory (1987:78) as described above.

## CHAPTER 3

### Education Leadership Learning – a Review of the Current Discourse

#### 3.1 Introduction

As indicated in Chapter 2, one of the reasons for the selection of Engeström's Activity Theory (1987:78) as the theoretical framework was so that it could serve, through the different elements of the theory as they apply to an education leadership learning activity system, as a guide for the review of literature for the study. The review of literature started in Chapter 1 where, in the orientation and background to the study, the first *what* question was answered with a description and definition of the *object* of the education leadership learning activity system, namely education leadership learning.

The first of the next two chapters that constitute the formal review of the literature in the field of education leadership learning, focuses again on the *what* and adds to this a discussion of the *who* of education leadership learning as it investigates the current discourse in that field. It does so by initially clarifying the key concepts in the study, namely education leadership, learning and education leadership learning, and by continuing the critical reflecting on both the *object* (education leadership learning) and the *outcome* (improved education leadership practice) of the education leadership learning activity system as it is described in Chapter 2. Later in the chapter the spotlight turns onto both the *subject* and the *community* of that learning activity system, namely education leadership learning students, both as individuals and as members of education leadership learning classes or cohorts respectively. In order to do this, Chapter 3 investigates both the reasons for the current interest in- and the importance of education leadership learning and the level at which such learning is currently and should ideally be provided, and closes with an investigation into and discussion of the experiences and perceptions of both international and South African education leadership learning students of their own education leadership learning.

The second of the two chapters presenting a review of the literature on education leadership learning will focus on the *how*, in other words the *tools and artefacts, rules*

and the *division of labour* of the education leadership learning activity system, by investigating current and best practices in the field of education leadership learning provision and the relationship between these practices and various theories of learning.

## **3.2 Concepts and Terminology**

### **3.2.1 Concept Clarification - Education Leadership**

Huber and Muijs (2010:58) describe school leadership that counts and in their opinion makes a difference to the academic achievement of learners as “firm and purposeful, sharing leadership responsibilities, providing decisive and goal-oriented participation of others in leadership tasks so that there is a real empowerment in terms of true delegation of leadership power (distributed leadership) and that there is a dedicated interest in and knowledge about what happens during lessons in the classroom”.

Experts from around the world who attended the 2009 International School Leadership Symposium, when asked to describe good education leadership, defined it as leadership “strongly connected to the notion of learning” (instructional leadership), and declared that good school leaders have “the responsibility to create an optimal learning environment for all and to motivate all stakeholders, including him/herself”. These experts stated that school leadership should not be rigid, but should be “like a bamboo cane – adaptable to different situations and flexible and at the same time consistent” (Huber & Muijs, 2010:vi). They continue to state that good education leadership is able to mediate between the external and internal environment of the school and between different role players, for example between educators and learners or educators and parents or between different groups within the school, and emphasised the importance of shared or distributed leadership, leadership based on “cooperation and working in teams” (Huber & Muijs, 2010:vii), which requires clear and explicit goals from the school leader. School leadership is, in the opinion of these authors (Huber & Muijs, 2010:viii), a service orientated activity that supports educators in their professional growth and development by consciously initiating, developing and supporting such development. In their opinion, to lead a school means more than just the satisfactory completion of certain administrative

tasks - they see good school leadership as “creative, flexible, scientific, honest, transparent and future orientated” and good school leaders as persons of high ethical and moral awareness (Huber & Muijs, 2010:vii).

Although leadership, according to Dennis (2014:108), “is often defined in terms of formal roles and complex functions within organisations”, the concept of leadership, in the opinion of both Boaden (2005:6) and Fitzgerald and Gunter (2008:331) is hard to define and “elusive in both definition and practice”, but that, in its essence, leadership is a “purposeful, positive act or activity” (Fitzgerald & Gunter, 2008:331), while Brauckmann and Pashiardis (2011:13) define leadership in the educational context as “the nexus of all behaviours and practices that school principals use in order to influence the behaviour of others”. Van Deventer and Kruger (2011:65) define this purposeful act or behaviour in the education context as the ability of the leader within the school context to inspire and motivate the various role players to effectively and efficiently drive and perform the core business of the school, namely teaching and learning.

Brauckmann and Pashiardis (2011:30) confirm Fitzgerald and Gunter’s (2008:331) and Boaden’s (2005:6) belief about the elusiveness of a definition for the concept of leadership when they state that it is a complex construct, and in their opinion the sum of five component leadership styles, namely instructional leadership, structuring leadership, participative leadership, entrepreneurial leadership and personal development leadership. Each of these styles encompasses specific leadership practices or behaviours, and the school leader’s use of these styles is dependent on both systemic and school level environmental and legal/policy framework contexts (Brauckmann & Pashiardis, 2011:13).

For the purposes of this thesis, education leadership is defined as the sum of all the purposeful behaviours, acts and/or activity of a school leader focused on and directed towards inspiring, developing and motivating all the role players within the school context to effectively and efficiently drive and perform the core business of the school, namely teaching and learning.

As indicated in Chapter 1, although the term education *leadership and management* is often employed as an overarching term to describe the many roles and functions of school leaders, (van Deventer & Kruger, 2011:67), it is important to remember that the concepts of leadership and management are in fact separate and distinct concepts (Bush, 2007:392, Christie, 2010:695) - the concept *leadership* is often linked to the provision of direction and a context of change (Bush, 2007:392, Christie, 2010:695) as well as to the setting and pursuit of a vision and mission (van Deventer & Kruger, 2011:68), while the concept *management* is more closely associated with function - with for example developing and implementing plans and the maintenance of processes and procedures to accomplish the goals of an institution (van Deventer & Kruger, 2011:71, Christie, 2010:696). What is interesting in this regard is that, in the context of education leadership learning, Glatter (2009:229) is firm in the notion that developers of education leadership learning programmes “must take management as seriously as leadership”, stating that these two concepts must remain closely linked in both the school and in education leadership learning if “school’s aims are to be achieved” and schools are to be or become effective.

Van Deventer and Kruger (2011:70) provide a comprehensive list of the roles of an education leader which includes functions such as providing direction and inspiration for both the school and the staff, building and developing teams within the school, setting an example in both service to staff and the school and in professional and educational practice, and managing the change that is an inevitable part of the growth and development of all organisations. This list is corroborated by Bush (2007: 391) when he states that deciding on the aims of the organisation is one of the primary leadership functions of a successful school leader.

Van Deventer and Kruger (2011:73) also identify six major management areas within a school, namely learner affairs, staff affairs, school community relations, physical facilities, financial affairs and administrative matters. These management areas are addressed by means of four management functions that link with and are intertwined with the leadership functions and management areas mentioned above. These are planning, organising, leading and directing, and controlling and evaluating (van Deventer & Kruger, 2011:75). Each of these management functions includes a number of specific tasks that together constitute the overall education management

function. Planning entails setting a vision, mission, aims and outcomes for the school as well as problem-solving, decision-making and policy making, a function that is very closely linked to and overlaps with what Bush (2007:391) and others (Robinson *et al*, 2008:27, Leithwood *et al*, 2008:29, Brauckmann & Pashiardis, 2011:13,) describe as one of the key leadership roles, namely deciding on the aims of the organisation. The function of organising encompasses the tasks of establishing an organisational structure, delegating tasks and responsibilities to other role players and coordinating the myriad of activities and tasks that make up everyday school life. Within the management function of organising, the role of distributing roles and tasks (Hoadley, Christie & Ward, 2009:337, Hallinger *et al*, 2010:19, Gurr & Drysdale, 2013:62) emerges as not only a management function but also a leadership role. The backbone of the leading and directing function is communicating, motivating, negotiating and managing conflict, while controlling and evaluating as both a management function and a leadership role (Brauckmann & Pashiardis, 2011:15) entails supervision and evaluation of all relevant aspects of the school, taking corrective action when required and also encouraging and maintaining staff discipline (van Deventer & Kruger, 2011:75-76).

From the above it is clear that the concepts of leadership and management overlap (Bush, 2007:392), and that the role of a school leader entails a fine balance between *direction* and *function* (Botha, 2004:240, Louis & Miles in Huber, 2004:673). This overlap is borne out not only by the review of the leadership roles and management functions set out above, but also by the fact that school leaders are often not aware of whether a specific task or role is a leadership one or a management one (Leithwood *et al* in Bush, 2007:391).

In summary, it is important to note and remain aware of this interconnectedness of leadership and management through the links between what the literature describes as the school leaders' leadership *roles* and management *functions*. Take as an example of this the setting of a vision and mission for the school, something that has been shown from the literature to be one of the primary responsibilities of a leader (Hallinger *et al*, 2010:22), but also a definite management task as part of the function of planning (van Deventer & Kruger, 2011:75).

### 3.2.2 Concept Clarification - Learning

Schunk (2012:3) posits that there is no single universally accepted definition for the concept of learning, but that a generally accepted definition of the concept is that learning, as the oldest and most fundamental social process (Tight, 1996:21), is “an enduring change in behaviour, or in the capacity to behave in a given fashion, which results from practice or other forms of experience”. Learning, Schunk continues, “involves acquiring and modifying knowledge, skills, strategies, beliefs, attitudes and behaviours” (2012:2), and learning can be considered to have taken place when a person is capable of doing some action differently (Schunk, 2012:4). The major difference between this definition by Schunk and one of the most popular definitions of the concept coined by Kimble in 1961 (Hergenhahn & Olson, 2001:1) is the matter of the endurance of the newly learned behaviour - while Schunk posits that the change of behaviour is *enduring*, Kimble suggests that the new behaviour could also be only “relatively permanent” (Hergenhahn & Olson, 2001:2), because of the effects of for example aging and the displacement of old learning by new learning (Hergenhahn & Olson, 2001:3).

### 3.2.3 Concept Clarification - Education Leadership Learning

To re-iterate the detailed discussion on this matter in Chapter 1, the concept of education leadership learning is defined for this study as the broader context of all formal, planned, articulated and relevant learning activities and content that take place in or are presented as part of a formal course of study or programme aimed at the expansion of education leaders’ knowledge, capacities and skills in order to increase their effectiveness as education leaders. As mentioned in Chapter 1, the focus of this definition is on the learning that education leaders engage in, including and across the traditional divide between leadership preparation (pre-service learning by education leaders - Bush, 2012:2) and leadership development (learning by education leaders who are already practicing as such - Walker & Dimmock, 2006:126).

This definition also does not distinguish between the different levels (short course, workshops, in-service training, diploma courses, undergraduate or postgraduate degrees) at which education leadership learning takes place, but rather focuses on

the education leadership learning that is presented to both potential and serving education leaders at all levels. Also, within the definition of education leadership learning proposed here, no distinction is made between professional degrees (mastery of the subject matter and techniques of a professional field to promote distinguished practical performance - University of California, Berkeley, 2015) and academic degrees (advanced studies in an academic discipline with an emphasis on theory and knowledge in a specific field rather than for application to professional practices - New York State Education, 2007).

Despite the differences of opinion on the endurance of learning, the definitions proposed by both Schunk (2012:3) and Kimble (Hergenhahn & Olson, 2001:1) substantiate the definition of education leadership learning proposed both here and in Chapter 1 because they mirror to a large extent the outcome proposed for the learning act of education leadership learning, namely the “expansion of education leaders’ knowledge, capacities and skills in order to increase their effectiveness as education leaders”, with the envisaged increase in effectiveness being the “enduring change in behaviour, or in the capacity to behave in a given fashion” prescribed by Schunk (2012:3).

### **3.3 Reasons to Study Education Leadership Learning**

*“The discourse on effective leadership for school improvement brings under the spotlight the significance of leadership preparation and development and whether training programmes equip leaders with the necessary skills they need to address current and emerging school challenges. It follows then that researchers should therefore continually be asking critical questions about how school leaders are prepared for the role, what type of leadership development they received and what impact training has.”*

(Bush & Moorosi, 2011:59)

The statement by Bush and Moorosi serves as the ideal opening for a discussion of the reasons for investigating the methodology, content and influence of education leadership learning. Smylie, Bennett, Konkol and Fendt (2005:141) contend that understanding the factors that support or detract from education leadership learning

is important, because it is only with such understanding that the most effective and efficient education leadership learning content and methodology can be identified and developed. These authors agree that in order to improve the focus, content and methodology of education leadership learning programmes and in so doing improving the impact and outcomes of such learning on school leaders' leadership practice, scholars around the world need to continue to study all the different facets of education leadership learning.

In explaining the reasons for continued investigation into education leadership learning, Bush and Moorosi (2011:61) use the concepts of *blank spots* and *blind spots* borrowed from Heck and Hallinger (1999:141) to identify three so-called blank spots in this field of research. By way of explanation, Heck and Hallinger (1999:141) define *blank spots* as areas where very little or no research has been conducted into a phenomenon and *blind spots* as "areas in which existing views of knowledge impede us from seeing other facets of the phenomenon under investigation".

The blank spots in the research on education leadership learning identified by Bush and Moorosi include the fact that, despite comprehensive studies in 2008 by Bush himself and by Crow and others (2008) into the education leadership learning practices of a large number of countries, a substantial number of individual countries around the world were not included, resulting in a gap in the literature "which calls for more comprehensive country-by-country analyses and comparative analyses that will inform learning across boundaries" (Bush & Moorosi, 2011:61).

Bush and Moroosi (2011:62) also contend that the existing literature on education leadership learning focuses largely on the Western and developed perspective of the phenomenon and is "not very strong on experiences from the South and the developing world", a fact that further emphasises the importance of studies in the developing context such as that found in South Africa, where the programme that served as the research site for the study reported on here, is located.

The third issue that Bush and Moorosi highlight as a *blank spot* has already been alluded to in Chapter 1 and that is the diverse set of problems and challenges that the developing world is dealing with compared to those experienced by countries in the developed world. They contend that, while the Western world's leadership

learning appears to be focussed on leadership succession planning in the face of the imminent retirement of the so-called baby boomer generation of school leaders, in Africa an “abundance of unskilled school principals” who are being overwhelmed by the role they are expected to fulfil, determines the focus of education leadership learning in the global South (Bush & Moorosi, 2011:62), where their studies have found evidence of a continuing lack of education leadership preparation and development (Bush & Moorosi, 2011:59).

Another reason for continued investigation into education leadership learning, according to Lumby *et al* (2008:xxx) is the internationalisation of such learning. They support the idea that, although focusing on specific contexts, needs and challenges, education leadership learning should take place and promote the international perspective in what they call “learning with and from each other” (2008:xxx).

Finally, Smylie *et al* (2005:139) report that, because the vast majority of literature on education leadership learning focuses on the principal and relatively little of it focuses on the development of other levels or tiers of education leadership, research into education leadership learning should continue and should be expanded to include aspects of the education leadership learning of school leaders at the other levels of leadership within the school. In the South African context this translates into a lack of research on the education leadership learning of school leadership role players such as deputy- or assistant principals, heads of department (middle managers), educators and grade leaders, as well as education department officials in leadership roles at both provincial and national level. Smylie *et al* (2005:139) describe this lack of research as a serious shortcoming in the field of study concerned with education leadership learning, one that will be addressed to a certain extent by the study reported on here.

In summary, the study being reported on here will, in addition to the rationale for the study presented in Chapter 1, attempt to address a number of the *blank spots* identified by Bush and Moorosi (2011:59) - in the first place it will attempt to contribute meaningfully to the education leadership learning literature from the perspective of the developing global South, and in the second place it hopes to contribute to the body of knowledge on education leadership learning that focuses

more widely than on just the principal or headmaster as the only leader in a school – this will be done by investigating an education leadership learning programme that is directed at all levels of leadership within the South African education system.

### **3.4 The Importance of Education Leadership Learning**

A study of the literature in the field of education leadership learning reveals many and varied reasons for the recent focus on this matter. As alluded to in Chapter 1, the changing social-, economic-, political- and educational situations faced by school leaders at all levels has brought about vast and rapid changes to the scope, function, direction and practices of school leadership as well as changes to the expectations of educators, parents and schools with regard to the role and function of school leaders. Education leadership learning has become, according to Bush (2007:321), one of the most important educational issues of the new millennium.

#### **3.4.1 School Leadership as a Profession in its Own Right**

One of the reasons for the increase in interest in education leadership learning is an increasing view internationally of “school leadership as a profession in its own right” (Huber, 2010:230), producing a tendency towards more extensive education leadership learning programmes that explore and address many more of the challenges and responsibilities of the profession (Huber, 2010:233). Glatter’s (2009:226) attributes of education leaders illustrate the growing professionalism of school leadership and include “the ability to live with uncertainty and to learn from mistakes, agility, adaptability and a preparedness to distribute leadership, work across boundaries and build trusting relationships”. He suggests that these attributes are likely to become more and more important for education leaders in the future, a suggestion that speaks directly to both the *what* and the *how* of education leadership learning in the future (Glatter, 2009:226). The importance of these professional abilities is confirmed by Huber (2010:233), who believes that there is a growing awareness on the international education stage that becoming and being an effective school leader requires “a demanding set of attitudes, attributes, skills, knowledge and understanding” for which school leaders have to be prepared and developed. Rhodes and Brundrett (2009:368) underscore the professional aspects of school leadership when they state that “learning to lead has never been more important than now”. The

view of school leadership as a distinct profession is therefore an important factor in the increase of interest in the education leadership learning offered to school and other education leaders.

### **3.4.2 The Pressures of Being a School Leader**

Another reason for the increase in interest in the field of education leadership learning is an awareness of the fact that modern school leaders function on a higher level and under considerably more pressure than school leaders of old (Davis *et al*, 2005:3). The pressure of being a principal is unrelenting and the past two decades have seen an increase in the demands on school leaders as their jobs have become ever-increasingly more complicated and all-encompassing (Crawford & Early, 2011:106). This has led to an increased demand for- and focus on education leadership learning, both in the preparation of pre-service school leaders and in the development offered to already-serving school leaders. This increasing pressure and complexity also accounts for the fact that education leadership learning has become one of the central concerns for education policy makers globally (Crawford & Early, 2011:107, Huber, 2010:225). Added to this is the fact that schools are becoming increasingly diverse, with increasingly heterogeneous learners, educators and parents, – a fact that places additional pressure on school leaders (Huber & Muijs, 2010:viii). This is especially true in the South African context where, after the attainment of democracy in 1994 and the scrapping of *apartheid* education laws that dictated separate schools and even education systems for different races, schools rapidly became more racially and culturally integrated and diverse, contributing in no small measure to the increase in pressure already felt by school leaders in this country in the rapidly evolving and changing new unified education system (Mestry & Singh, 2007:475).

### **3.4.3 Increased and Increasing Decentralisation in Education**

A third reason why education leadership learning has assumed a more important place in education research is the increasing decentralisation internationally of education regulation and control and the devolution of the responsibility and accountability for the outcomes of education to school level (Mestry & Singh, 2007:478, Moloi, 2007:464, Huber & Muijs, 2010:ix, Bush *et al*, 2011:32). Examples

of this trend towards decentralisation can be found in England with the introduction in 1988 of the Education Reform Act and in the introduction in New Zealand a year later of the Reform in Education Administration Act, both of which, broadly speaking, required schools in those countries to become self-managing and fiscally effective and efficient (Fitzgerald & Gunter, 2008:333). Whereas in South Africa before 1994, the management of education was highly centralised (Christie, 2010:699), the introduction in 1996 of the South African Schools Act (Act 84 of 1996) increased the responsibility of school leaders for a number of matters such as policy implementation, school and learner performance and the management of staff (section 16A2(2)). School leaders also became responsible for the provision of guidance for and cooperation with the school governing body (a body made up of elected parents) (section 16A2(3)) and the management and use of school finances (section 16A3(h)). Such decentralisation of the education system and the devolution of responsibility and accountability to school level not only increases the pressure felt by those in school leadership positions, but requires, indeed forces, school leaders to become and to be better prepared for their task (Huber & Muijs, 2010:ix). They posit that there appears to be “a broad international agreement about the need for school leaders to have the capacities required to improve teaching and learning and pupils’ development and achievement” (Huber & Muijs, 2010:225).

#### **3.4.4 Changes to School Leadership Roles and Responsibilities**

This trend towards increased decentralisation described above, together with global scientific, technological and economic advancements and changes and the impact of globalisation and mass human movement, which has given rise to increasing complexity and uncertainty in the modern world (Brauckmann & Pashiardis, 2011:12) both impact education. In 2005 Davis *et al* (2005:3) stated that the role of the school leader had “swelled to include a staggering array of professional tasks and competencies”, and that these roles required the school leader to be “an educational visionary, instructional and curriculum leader, assessment expert, disciplinarian, community builder, public relations and communications expert, budget analyst, facilities manager”. He or she was also often required to serve the divergent needs of stakeholder such as parents, provincial and national education departments and unions (Davis *et al*, 2005:3). As an endeavour firmly rooted in human society and the

modern world, the increasing complexity and uncertainty in society alluded to earlier has created a concomitant complexity and uncertainty in the field of education, and the roles and responsibilities of school leaders have therefore, as seen above, “undergone multiple changes and their tasks and responsibilities have increased” in the last number of years (Huber & Muijs, 2010:ix). These changes also involve for example a shift from an emphasis on administrative tasks and duties to a greater focus on school development and the development and improvement of teaching and learning, as well as to the improvement of learner achievement, with school leaders increasingly held accountable for the results achieved (Huber & Muijs, 2010: x).

### **3.4.5 Effective Leadership for School Effectiveness and Quality Education**

As far back as 1998, Bush (1998:323) stated that “it has become received wisdom that the quality of the head (*principal / school leader*) is the single most important variable in school effectiveness”. As alluded to in the orientation and background to this study (Chapter 1), school leaders make a difference to the schools they lead (Hale & Moorman, 2003:5, Mestry & Grobler, 2004:128, Riley & Mulford, 2007:87, Crawford & Early, 2011:105, Leithwood *et al*, 2008:27) because they exercise a measurable, though indirect effect on school effectiveness and learner achievement (Leithwood *et al*, 2008:27, Brauckmann & Pashiardis, 2011:12). The indirectness of this effect is explained by Early and Evans (2004:335) as the mediated impact school leaders have on both the work that the members of a school’s staff perform and also on the climate and culture of a school. Substantiating the existence of this indirect yet measurable effect is the fact that school improvement is dependent on the quality of teaching and learning in classrooms, a matter which in turn is dependent on the quality of leadership existent in a school (Rhodes & Brundrett, 2009:362), because effective school leaders “are pivotal to the effectiveness of schools in delivering quality teaching and learning programmes” (Brundrett, Fitzgerald & Sommefeldt, 2006:90) and also to the creation of “goal-directed, problem-solving, creative, self-renewing schools” (Huber & Muijs, 2010:59).

Among Leithwood *et al*’s (2008:27) seven strong claims about successful school leadership, two of these claims re-iterate the point that effective leadership promotes effectiveness in schools. They state that, as mentioned elsewhere in this thesis,

effective school leadership is “second only to classroom teaching” in its impact on learner performance (Leithwood *et al*, 2008:27) and school leaders influence learner performance through their influence on teachers’ motivation, work ethic and working conditions (Leithwood *et al*, 2008:28). This widely accepted notion that effective school leadership contributes to school improvement and learner achievement appears, according to Bush and Moorosi (2010:60) “to be the starting point for the global debate on what type of leadership training programmes should be provided in preparation for school leadership”. This thought is echoed by Zhang and Brundrett (2010:154) who contend that much of the impetus for the international interest in school leadership development stems from the “conception that leadership makes a difference to effectiveness, measured in terms of enhanced, value-added output”. The provision of education leadership learning opportunities to school leaders is viewed as one of the crucial parts not only of building effective education systems in which schools are places where the core functions of teaching and learning are properly planned and executed, and where learners achieve (Bush & Jackson, 2002:418), but also of maintaining the success of such systems (Smylie *et al*, 2005:138, Zhang & Brundrett, 2010:154, Crawford & Early, 2011:117).

### **3.4.6 Changes to and Differences in International Education Contexts**

Bush and Moorosi (2011:63) and others (Crow, Lumby & Pashiardis, 2008:143, Brauckmann & Pashiardis, 2011:12) believe that schools and school leaders are facing ever increasing demands due to the forces and effects of globalisation, described by Burbules and Torres (2000:4) as the integration of local cultures, communities and economies into a global network of politics, political ideas and political ideals through improvements in global communication, transport and trade. Huber (2010:315) contends that these national as well as international changes in the social, economic and political arena have had an impact on the education systems in many European countries, and that these changes have increased the need for the provision of education leadership learning to the leaders in every education system.

In this regard, Bush and Moorosi (2011:62) point to the diverse leadership development approaches used in different countries and explain that this diversity is

the result of different contexts and different conceptualisations of both leadership and the manner in which leaders are prepared and developed. These varying conceptualisations are to some extent the result of the diversity of issues that is being dealt with in the developed and developing world respectively. As mentioned before, in the developed and mostly Western world for example, leadership learning focuses on leadership succession planning in the face of the imminent retirement of the so-called baby boomer generation of school leaders, while in Africa and the developing global South, an “abundance of unskilled school principals” (Bush & Moorosi, 2011:62) who are being overwhelmed by the changes to and complexity of the role they are expected to fulfil, determines the focus of education leadership learning in that region. This is linked to what Bolam (2003:82) and Crow *et al* (2008:143) posit, and that is that education leadership learning should focus on and address the specific needs and challenges of a particular education context whilst still maintaining space for an “international perspective in learning with and from others” (Lumby *et al*, 2008:xxx). This they substantiate with the argument that leadership “no longer serves the homogeneous communities that existed before globalisation”, and this, together with the fact that the nature and function of school leadership across the globe is critically dependent on and determined by context at both the systemic and the individual school level (Brauckmann & Pashiardis, 2011:29) and because, as mentioned in the previous chapter, school leaders “do not operate in a vacuum” (Brauckmann & Pashiardis, 2011:13), education leadership learning programmes should be highly contextualised in order to “prepare leaders for global heterogeneous communities” (Lumby *et al*, 2008:7).

Because of the effects of globalisation and the changes this phenomenon has wrought in the field of education leadership, Bush and Jackson’s (2002:427) 2002 study of fifteen (15) international school leadership learning programmes found that “the striking feature (of these 15 programmes) is that nations and states have developed very different models to address their common need for higher quality leadership in schools”. They posit that these differences are the result of “very different political, social and professional contexts, which have led to the provision being tailored to the particular requirements of each society” and that it is therefore vital to realise and keep in mind that what works in one country and its particular context may not work in the context of another (Bush & Jackson, 2002:427).

### 3.5 The Ideal Level for Education Leadership Learning

The question of at which level, whether an academic level or a professional one, education leadership learning should ideally be offered is an important one for this study. Just as there appears to be considerable disagreement on the types of school leaders the schools of the present and those of the future require and will require, as well as on what skills, knowledge and attributes they should possess and how they should be trained (Crawford & Early, 2011:108), there appears to be considerable disagreement on whether an academic or a professional level qualification is more appropriate for education leadership learning. As alluded to in Chapter 1, the distinction between professional degrees and academic degrees lies in the fact that a professional degree focuses on the mastery of the content and practices related to a specific field (University of California, Berkeley, 2015), while an academic degree focus on the theoretical study of a specific discipline (New York State Education, 2007).

Crawford and Earley (2011:108) posit that one of the challenges experienced in the development of education leadership learning programmes, whether for development or for preparation, has been striking the balance between “the academic and the practical”. If one takes the academic level to reflect the theoretical and content side of a programme and the practical level to reflect the manner in which the theory and content is applied in practice, then the challenge these authors describe is how one provides school leaders with both the theoretical knowledge on leadership they require *and* the opportunities to put their new-found knowledge into practice.

The debate over the issue of professional versus academic level programmes and qualifications is not a new one. Brundrett *et al* (2006:91) report for example that, during the 1980s in the United Kingdom, modular or taught postgraduate degrees in educational management were becoming more and more important in that country. This happened, they state, despite the fact that tertiary institutions and schools had very different ideas of what was required - these programmes and degrees were seen by the tertiary institutions as academically orientated while schools, the supposed beneficiaries of these programmes and degrees, tended to see their need, that is learning and development in education management, as “a very practical

activity which was divorced from theory”. These authors (Brundrett *et al*, 2006:91) then go on to report that, by the early 1990s, an acknowledgement was growing that the skills both required for and developed in the school context “should be seen as an integrated part of academic programmes”. This awareness then led to support for the continuation of programmes such as masters’ degrees with a broader focus that created opportunities for reflection and for personal as well as professional development for their students, and that were able to retain academic rigour while still addressing the professional needs of educators (Brundrett *et al*, 2006:92).

Continuing with the United Kingdom as an example, that country’s National Professional Qualification for Headship (NPQH), as it was implemented is a professional qualification rather than an academic one, and as such it differs to some extent from the specialist master’s degrees offered at university level. This qualification has also been criticized for its daunting nature and for its lack of “the college experience” (Crawford & Earley, 2010:107).

So what then is the ideal level at which to present meaningful education leadership learning? Bush and Jackson (2002:424) argue that principals and other aspiring education leaders should gain their qualifications at masters’ degree level, as teaching is a graduate level profession in most developed countries, and that it is therefore logical that subsequent learning should be done at a postgraduate level. In this regard they state that “there is an obvious logic in regarding subsequent training for leading professionals in schools to be at or near masters’ level” (Bush & Jackson, 2002:425). Brundrett *et al* (2006:100) suggest that it is vital that school leaders possess knowledge of theory, research and practice in order to extend the ways in which their leadership can be exercised. According to Bush (1998:328), principalship “involves complex, practical and interactive processes” for which principals need among other things “higher order skills, a deep understanding of school contexts and cultures and a firm grasp of theory and relevant research”. This set of skills should enable school leaders to develop the theoretical and practical frames of reference they require to guide their behaviour and decision-making (Bush, 1998:328).

He further contends that although much of the content of professional and academic programmes is similar, professional qualifications tend to pay much less attention to research, theory and the use and understanding of academic literature, while

universities offering specialist masters' degrees stress these aspects as part of academic scholarship (Bush, 1998:330). In fact, in his 1998 recommendations of ways in which to improve the NPQH, Bush suggests that this essentially professional qualification should be linked to what he calls "an appropriate Masters' degree" in order to give school leaders the opportunity to move freely between professional and academic development "as their needs dictate" (Bush, 1998:331). In this regard, Bush and Jackson (2006:424) contend that, while leadership and management are practical activities, an appreciation of relevant theory and research is vital for the creation of frames of reference in addition to and in many cases larger than the principal's own experience. Indeed, they say, this link to theory has been recognised in many school leadership programmes including those presented in Sweden, the United States of America and Australia (Bush & Jackson, 2006:424).

More recently and along the same lines, Bush and Moorosi (2011:63) contend that schools world-wide are being faced with ever increasing demands "due to the forces of globalisation and growing accountability", and that these demands "require highly skilled and well-prepared leadership", and that the complex nature of the practice of school leadership "arguably requires higher order intellectual skills" such as those presented and developed at postgraduate level (Bush & Moorosi, 2011:64). In support of their argument, they site masters' level qualifications in for example North Carolina in the United States of America, where the Masters in School Administration (MSA) is a requirement for all principal appointments, as well as the fact that many programmes, but specifically the Principal's Leadership Programme offered in Sweden and the Singapore Leaders in Education course, although not officially accredited as such, are both offered in conjunction with tertiary education institutions and are planned and presented at a masters' level (Bush & Moorosi, 2011:424).

Brundrett *et al* (2006:100) suggest that education leadership learning programmes that are linked with "theory-research-practice" have the potential to reduce leadership conformity and the one-size-fits-all leadership approach and thus to prepare leaders for their own unique school, social and national situation and context. They state that "if school leadership programmes are to be successful, they must integrate the best of academic programmes and take full account of emerging research evidence" (Brundrett *et al*, 2006:100). However, they say, such programmes must also reflect

and take into consideration the unique context and characteristics of each individual school leader (Brundrett *et al*, 2006:101).

As far as the ideal level of education leadership learning programmes in the unique South African context is concerned, the discussion earlier in this thesis of the levels and types of education leadership learning qualifications offered in South Africa brought to light the fact that, of the four most popular qualifications - the Advanced Certificate, the Bachelor of Education Honours degree, the Postgraduate Diploma and the Master's degree - only one is offered at undergraduate level (the ACE), while the other three are postgraduate qualifications. In the complicated South African context, where, according to Christie (2010:708), "there is no single, entrenched picture" of what school leadership entails, a recognition of "the situated complexities of the work of running a school", and the recognition of and accounting for context, both of the school and of the leaders, appears to be essential in the provision of education leadership learning opportunities that will suit and prepare a very diverse school leader population for the intricacies of their profession. Therefore, in a country where the field of education, for historical political reasons, is characterised by education leaders with education and education leadership qualifications spread across a long continuum ranging from one year diplomas at one end to four year degrees at the other, the provision of education leadership learning programmes at both undergraduate and postgraduate levels makes sense because it provides entry to education leadership development opportunities and programmes for the holders of existing education and education leadership qualifications along the full length of that continuum.

However, from the above discussion it is clear that there is widespread recognition of the fact that education leadership learning, whether as preparation for school leadership roles or as development for serving school leaders, should be pitched at postgraduate level. However, not all opinion supports the delivery of education leadership learning at that level. Orr (2011:115) discusses the criticism of postgraduate level education leadership learning programmes in the United States of America which centres on, among other aspects, their lack of focus, vision and purpose, their out-dated content, inappropriate methodology and teaching strategies and finally their lack of academic rigour. She expresses some doubt as to whether

Faculties of Education at universities have the capacity to overcome the forces within these institutions that dictate the use of conventional formats, content and pedagogies for the delivery of education leadership learning, and states that most universities appear to use such programmes primarily as sources of additional revenue (Orr, 2011:116). Indeed, it is this use of conventional formats, content and teaching strategies that she foresees as the greatest challenge to education leadership learning at postgraduate level. If this is indeed so, she posits, then the innovations in approach such as participant-driven curricula, problem-based learning, action learning and learning communities indicated in contemporary literature on the topic of education leadership learning may be far more difficult for passionate leadership developers to implement than it at first appears (Orr, 2011:117).

Although Bush is a strong proponent of the offering of education leadership learning at postgraduate level (Bush, 1998, Bush & Jackson, 2002, Bush & Moorosi, 2011), he has some reservations and concerns in this regard. Writing with Jackson, they call theory “distilled experience” (Bush & Jackson, 2002:425) and state that aligning education leadership learning provision with a master’s level qualification raises some fundamental questions about exactly what constitutes meaningful and developmental postgraduate work for aspiring and practicing school leaders, while Eacott (2013:44) also expresses concern for what he refers to as the “highly problematic proliferation of professional standards and leadership capability frameworks” and a sense of “an inherently anti-intellectualism” that negates, to some degree, the advantages and desirability of offering education leadership learning at university level.

While the researcher is in agreement with Bush with regard to the offering of education leadership learning at postgraduate level (Bush, 1998, Bush & Jackson, 2002, Bush & Moorosi, 2011), he shares the concerns of Bush and others (Bush & Jackson, 2002:425, Eacott, 2013:44) that postgraduate qualifications tend to lay strong emphasis on theory at the cost of practical experience and learning. The researcher also believes that, given the unique South African situation described above, high quality education leadership learning programmes should be and remain available across a range of qualification levels in order to cater for potential students at both ends of the existing qualification continuum and at every position along it.

Finally, it must be mentioned that this discussion of the ideal level for education leadership learning appears to substantiate the researcher's decision to focus his study on the experiences and perceptions of students of master's degree programme in education leadership learning of their leadership learning, in the hope that the findings will contribute to the debate reported on above.

### **3.6 The Value to Leaders of Leadership Learning in Education**

#### **3.6.1 The Value of Education Leadership Learning in the International Context**

As mentioned earlier, Crawford and Early (2011:107) state that "exposure to and participation in leadership development activities may or may not bring about change to individual leaders' beliefs, values, attitudes and behaviours, and these changes to the individual may or may not lead to changes in the leadership practice and these changes may or may not lead to an improvement in student outcomes", while Bush (2012:4) states that, although widely believed to have an impact, evidence of the value and impact of such programmes remains inconclusive. These statements serve aptly as an introduction to an overview of the literature on the issue of what value education leaders attach to education leadership learning, and what they describe as their experience and perception of such learning.

In 2003 Hale and Moorman (2003:2) reported that school leaders across the United States of America felt that administrator training (the term used in the United States of America for leadership learning) deserved an 'F' (failing grade), and that 20 years of efforts to reform the manner in which school leaders were being prepared and developed for their tasks had produced little progress. The United States of America's federal Department of Education in 2005 characterised the leadership preparation programmes in that country as "lacking in vision, purpose and coherence" (Orr, 2011:115). It appears as if the general consensus is that these programmes are far too theoretical and totally unrelated to and out of touch with the daily tasks and functions of American school leaders (Hale & Moorman, 2003:4, Hess & Kelly, 2005:3). This is corroborated by Hess and Kelly (2005:3) when they report on the findings of a study conducted by the president of the Teachers College at

Columbia University that found that “the majority of educational administration (leadership) programmes range from inadequate to appalling, even at some of the country’s leading universities”. A more recent study by Ballenger, Alford, Mccune and Mccune (2009:533) studied the perceptions and experiences of graduates of an extensively revised university-level education leadership and learning programme at the Austen State University in the United States of America in terms of the programme features of ideal education leadership learning determined by recent research, namely a focus on the leadership of teaching and learning (instructional leadership), a relevant and coherent curriculum, “meaningful, quality school-based experiences through real-world internship activities and motivated and highly-qualified presenters and academic staff (Ballenger *et al*, 2009:551). The results of this study reveal a strong, positive link between the programme features of this revised programme and the perceptions and experiences of graduates of their own leadership learning outcomes (Ballenger *et al*, 2009:551), not only validating for that institution the changes it had made to its education leadership learning programme, but also to a large extent the features of ideal education leadership learning proposed by authors such as Davis *et al* (2005) and more recently Orr (2011).

The Hong Kong-based Education and Manpower Bureau commissioned research in 2004 into the then four year old education leadership learning programme for newly appointed principals. Walker and Dimmock (2006:126) made use of focus group interviews with candidates who had completed the programme during the period 2000 to 2003 to collect data for their report. The importance of the study lies in the fact that it explored the principals’ *perceptions* of what the programme meant to them after they had completed it (Walker & Dimmock, 2006:125). These authors summarise the research on the key perceptions of principals about the programme as follows - participants valued (a) the learning linked to school and specific leadership contexts, (b) the focus of the learning in the programme on “real-time, real-life” issues, (c) the mentoring, sharing and interaction by and with other students as well as with experienced school leaders, (d) the fact that the learning strategies, methods and content were flexible enough to meet the needs of individual school leaders at their own level and in their own context, (e) the provision of multiple opportunities for reflection and sharing, (f) the respect accorded the existing skills, knowledge and values of those participating in the programme, and (g) the

opportunities to bond with and develop interpersonal relationships and networks with fellow students (Walker & Dimmock, 2006:136). Generally, the participants appeared to prefer active participation in learning activities with a real-world focus and feel to those presented in structured learning situations (Walker & Dimmock, 2006:131).

In their evaluation of the Scottish Qualification for Headship (SQH), a programme with “a strongly professional orientation” (Menter, Holligan and Mthenjwa, 2006:8) graduates reported to the authors that they experienced (a) an enhanced ability to support others, (b) increased effectiveness as a leader, (c) an extension of their professional leadership practice (d) an increase in their personal and leadership confidence and (e) the development of their professional values (Menter *et al*, 2006:11). The graduates also reported an increase in their sense of the social and collective aspects of successful leadership, and an increase in the value the graduates place on research, theory and academic reading (Menter *et al*, 2006:13).

Bush, Briggs and Middlewood (2006:185) report the results of an evaluation of the New Visions programme offered under the auspices of the NCSL in England. Although not a university programme, the perceptions of the graduates of this programme are of interest to the study being reported on here. Participants reported that three aspects in particular were of value to them in their roles as school leaders, namely the opportunities to work with and learn from other school leaders, the opportunity to share and discuss problems with other school leaders and the support received from both the faculty of the NCSL and from mentors (Bush *et al*, 2006:193). The participants also reported significant increases in their confidence and the levels of their own professional development, as well as to their knowledge of education leadership theory and practice and their ability to influence people. As far as their leadership practice was concerned, participants reported a shift from a centralised leadership style towards more shared leadership and a focus on leadership for learning (instructional leadership as per Southworth, 2002:77, Huber, 2004:673, Bush *et al*, 2007:400, Bush *et al*, 2006:193). Although the National Professional Qualification for Headship (NPQH) in England has been criticized for its daunting nature and for its lack of “the college experience” (Crawford & Earley, 2010:107), participants in this programme reported to Crawford and Earley (2010:108) that they

were especially pleased with the personalized nature of the programme and with the use of the peer networks and coaching as learning tools.

A 2012 study of the perceptions and experiences of graduates of an education leadership learning programme developed and presented by a university-school district collaboration in the state of California in the United States of America conducted by Donmoyer *et al* (2012:10) had interesting results. The programme, classified as an exemplary one because of the fact that it utilises many of the features of exemplary programmes mentioned in recent literature (Donmoyer *et al*, 2012:10), prompted graduates to report that they valued and got most value from programme features such as (a) the use of cohorts or year/class groups and the opportunities this created for leadership socialization, (b) the use of group work and case studies, and (c) the programme's focus on collaborative and distributed leadership and the need for leaders in education to be instructional leaders (Donmoyer *et al*, 2012:36).

Within the socialist and therefore centrally controlled and highly stratified education system in China, modern education leadership learning as both development and preparation only began in the early 1990's after the publication in 1989 of the State Education Commission's (later Ministry of Education) "On Strengthening the Training for Principals of Elementary and Secondary Schools Nationwide" (Feng, 2005:13). However, training of principals in China remains a major weakness of the Chinese higher education system (Ribbins & Zhang, 2004:142). Given this weakness, it is not surprising then that almost all of the 25 rural headmasters in Zhang's study on ambition declared their experience of headship to have been a difficult, demanding and frustrating one (Ribbins & Zhang, 2004:143). Zhang suggests that it appears as if the Chinese education system has to date given less attention to principals than to educators. He further suggests that the improvement of the education leadership learning programmes in China will only be accomplished with new and imaginative policies based on a sound research foundation, a suggestion substantiated by a number of authors (Huber, 2010:230, Davis *et al*, 2005:8, Mansfield & Carpenter, 2008:4).

### 3.6.2 The Value of Education Leadership Learning in the South African Context

Here in South Africa, the students of a master's level programme at a prominent South African university other than the one that hosts the programme that served as the activity system for this study, reported that the theoretical components of the programme had “encouraged them to think in a new and independent way” (Heystek, 2007:502). They further posited that, in a context where education leadership learning provision appeared to be aimed more at the promotion and perpetuation of governmental policies and control, the programme had in fact prepared them to meaningfully critique and challenge many aspects of the prescribed policies and approaches (Heystek, 2007:502).

Chikoko's (2010:37) study among master's students enrolled for the MEd programme at the Faculty of Education at the University of KwaZulu-Natal, although focused more on student retentions and students' reasons for dropping out of the programme, revealed these students experiences of their learning nonetheless. When asked which teaching and learning strategies they found most beneficial, these students selected group activities and student presentations above simply attending lectures, with one student stating that “collaborative learning helps in sharing opinions and ideas...this promotes deep understanding” (Chikoko, 2010:40) and, according to Chikoko, showed evidence of a culture of self-directed study in the programme (Chikoko, 2010:45). These students also reported that the workload in terms of written assignments, when not planned properly by faculty staff (“these assignments are always due on the same date” – Chikoko, 2010:42), made success very difficult to achieve. The final aspect relevant to the study being reported on here is the fact that, by enlarge, the students in Chikoko's study preferred attending contact sessions on weekday afternoons rather than on weekends or in school holidays (2010:45).

Bush, Kiggundu and Moorosi (2011:31) evaluated the South African ACE:SL programme described in Chapter 1. This programme, introduced in 2007 as a threshold qualification for both serving and aspiring school leaders, consists of a curriculum designed by the former National Department of Education in cooperation and consultation with the National Management and Leadership Committee (Bush *et al*, 2011:33), and is offered by a number of South African universities. Their evaluation, divided into preliminary-, baseline-, mid-term- and impact phases, used

mainly interviews, surveys and observation to collect the views and experiences of not only the students of the programme, but also the university teaching staff and the mentors involved in the programme (Bush *et al*, 2011:34). However, for the purposes of the study being reported on here, only the views of the students about their education leadership learning are of interest and will therefore be briefly reviewed here.

As much as 80% of the students of the ACE:SL programme reported that the teaching and learning material (readers and learning guides for the modules (a) school leadership and management in South Africa, (b) managing teaching and learning, (c) leading and managing people, (d) managing physical and financial resources and (e) managing policy, development and governance - Bush *et al*, 2011:34) was and remains of great help and value to them, while the small number of criticisms leveled at these materials focused on their length and bulkiness (Bush *et al*, 2011:35). As far as the mode of delivery was concerned, the use of groups or cohorts found favour with the students, as did the combination of theoretical sessions (lectures presented at scheduled contact sessions), group work and the use of mentors (Bush *et al*, 2011:35). Another aspect of the programme that proved to be particularly popular with the students (76% said it was of great help) was the opportunity to develop networks with other school leaders who found themselves in both similar and different contexts and situations (Bush *et al*, 2011:36). One aspect of their education leadership learning during the programme that the ACE:SL students were critical of is the manner in which they were assessed (Bush *et al*, 2011:37). In this regard, the students were critical of both the number and the scope of the assessment activities they had to perform (Bush *et al*, 2011:37), while the evaluation team came to the conclusion that students found the use of portfolios and the concomitant requirement that students reflect on the education leadership learning they experienced during both the theoretical and the mentoring parts of the programme, very difficult (Bush *et al*, 2011:38).

Investigating the value of education leadership learning in the formation of leadership identity using the same programme as Bush and his co-authors, Moorosi (2014:799) found that both the serving and the aspiring leaders who participated in the ACE:SL reported that their education leadership learning during the programme brought

about both an increase in their self-confidence as leaders as well as the development of a distinct leadership identity. From his data Moorosi (2014:800) was able to conclude that, as their knowledge of education leadership increased and improved, the students gained self-confidence, improved their self-control and changed their leadership styles and “developed a clearer identity of themselves as leaders”. In this regard, the aspects of the programme that he identified as having had the most significant impact on the development of leadership identity were mentoring and networking (Moorosi, 2014:801).

### **3.6.3 The Value of Education Leadership Learning - a Summary**

In summary, this brief review of the results of selected studies - both international and in South Africa - into the perceptions and experiences of school leaders of their learning while enrolled for a variety of types and levels of education leadership learning programmes reveals some similarities. The first of these similarities is the school leaders’ appreciation for a focus on teaching and learning, in other words on instructional leadership (Ballenger *et al*, 2009:551, Menter *et al*, 2006:13, Bush *et al*, 2006:185, Donmoyer *et al*, 2012:36). This finding links with what Orr (2011:120) proposes as one of the core features of exemplary or ideal education leadership learning programmes, namely that they should be framed by a well-defined theory of leadership that focuses on school improvement.

The second similarity is the issue of context and the appreciation shown by school leaders for this feature when they participated in education leadership learning for programmes that take into account the context of both the leaders and their schools and countries (Walker & Dimmock, 2006:136, Crawford & Earley, 2010:107). The issue of context, discussed in detail in both the sections on global trends in education leadership learning (Huber, 2010:240) and in the section on the features of exemplary or ideal education leadership learning programmes (Orr, 2011:120), is an important one, because, as both Brauckmann and Pashiardis (2011:20) and Eacott and Asuga (2014:930) suggest, education leadership learning programmes that focus on equipping school leaders with the skills and knowledge to lead successfully in a variety of contexts, must logically take into account a variety of contextual factors in order to best respond to the needs of school leaders.

A third issue that appears in this review is that of experiential learning - participants in the review report that the use of real-world and real-life learning experiences and activities enhanced, in their opinion, their education leadership learning (Walker & Dimmock, 2006:125, Ballenger *et al*, 2009:551). This finding echoes the call by, for example, Day and Harrison (2011:457) for 360 degree feedback and Burgoyne and Williams (2007:10) for experiential learning-orientated sessions such as coaching, mentoring, networking, project-based work and action research, as well as the suggestion by Orr (2011:120) for active learning strategies and the provision of quality internships as part of ideal education leadership learning.

Fourthly, this review points to the participants' in education leadership learning programmes appreciation for the focus of such programmes on shared or distributed and instructional leadership (Crawford & Earley, 2010:107, Donmoyer *et al*, 2012:36, Menter *et al*, 2006:11), and also for the fact that they experienced an increase in their self-confidence and their professional confidence as school leaders (Bush, Briggs and Middlewood, 2006:185, Walker & Dimmock, 2006:131). The review also shows up the fact that participants generally perceived and experienced the opportunity to work with other school leaders and to share problems and learning tasks as valuable for their own leadership practice and identity (Walker & Dimmock, 2006:125, Menter *et al*, 2006:13, Donmoyer *et al*, 2012:10, Bush, Briggs & Middlewood, 2006:185).

### **3.7 Summary**

This chapter provided a critical review of the literature in the field of education leadership learning, and commenced with a discussion of the reasons why researchers should study this phenomenon. Heck and Hallinger's (1999) concepts of *blank spots* and *blind spots* as described by Bush and Moorosi (2011:61) were used to highlight the reasons why it remains important to investigate education leadership learning – one of the *blank spots* they identify is the fact that, despite fairly comprehensive investigations of the phenomenon in the western world, a substantial number of individual countries around the world have not yet been studied, meaning that the literature has a blank spot and is “not very strong on experiences from the South and the developing world” (Bush & Moorosi, 2011:62). This then is part of the gap in the literature that it is hoped will be filled by the study reported on here.

The next section of this chapter addressed the issue of the importance of education leadership learning. Six reasons why it is important for education leaders to be prepared and developed for this very important role were put forward – the emergence of school leadership as a profession in own right being the first of these reasons. The increased pressures facing modern school leaders together with the greater degree of decentralisation of regulation, responsibility and accountability in education and the changing milieu of education leadership that appears to be the norm internationally, and the need therefore to prepare and develop them to deal with these pressures and changes, was also mentioned as important reasons for the current focus on leadership learning. Finally, changes to the nature and role of the school leader and the greater awareness of the link between leadership and school effectiveness and education quality were mentioned as reasons for the importance currently attached to education leadership learning.

In the third section of this chapter, the ideal level at which education leadership learning should be offered was discussed, with the debate focusing on whether such learning should be offered at an academic level or a professional level. Crawford and Earley (2011:108) highlight the problem of striking the balance between “the academic and the practical”, while Bush and Jackson (2002:425) argue that, because teaching is a graduate level profession in most countries of the world, principals and other aspiring education leaders should gain their qualifications at masters’ degree level, an opinion which is corroborated by Bush and Moorosi (2011:63) when they contend that because of the ever-increasing demands on school leaders, schools demand and should get “highly skilled and well-prepared leadership”, and that the leadership they require “requires higher order intellectual skills” such as those presented and developed at postgraduate level (Bush & Moorosi, 2011:64). From the study of the literature in this regard, it would appear that, with only some dissent from for example Orr (2011), there is widespread recognition that education leadership learning should be pitched at postgraduate level.

As alluded to in the introduction, the following chapter will focus on the *how*, in other words the *tools and artefacts*, *rules* and the *division of labour* of the education leadership learning activity system, by investigating current and best practices in the

field of education leadership learning provision and the relationship between these practices and various theories of learning.

## CHAPTER 4

### Education Leadership Learning and the Theories of Learning

#### 4.1 Introduction

In the previous chapter, the literature review focused on the *what* and the *who* of education leadership learning by clarifying the key concepts in the study, namely education leadership, learning and education leadership learning, and in so doing it covered to some extent both the *object* (education leadership learning) and the *outcome* (improved education leadership practice) of the education leadership learning activity system. As part of the *what* and the *who* of the study, that chapter also focused on both the *subject* and the *community* of the education leadership learning activity system (students both as individuals and as members of education leadership learning classes or cohorts).

As alluded to in Chapter 3, this chapter will focus on the *how*, in other words on the *tools and artefacts*, *rules* and the *division of labour* elements of the education leadership learning activity system, by investigating current and best practices in the field of education leadership learning provision and the relationship between these practices and various theories of learning.

#### 4.2 Education Leadership Learning in Relation to Learning Theory

Paterson and West-Burnham (2006:113) believe that education leadership learning - in whatever format or at whatever level it is conducted - must be “explicitly learning-centred”. However, Firestone and Riehl (2005:144) posit that the literature on education leadership learning has largely been silent on the matter of “the social, psychological and cognitive processes by which school leaders learn and develop”, in other words on the matter of the relationship between theory or theories of learning and education leadership learning and the place of such theory in the discourse on education leadership learning. For this reason a discussion of education leadership learning necessitates not only the clarification of the concept of *learning* (see Chapter 3 and also section 2.1 below), but also a discussion of learning theory and the link between learning theory and education leadership learning. The chapter that follows

will therefore focus primarily on the act of learning as the *object* of an education leadership learning activity system by presenting an overview of learning theory and the place of such theory in the investigation into the experiences and perceptions of master's students of their own education leadership learning whilst enrolled in a master's degree programme in education leadership.

#### **4.2.1 Concept Clarification - Learning and Learning Theory**

If learning “involves acquiring and modifying knowledge, skills, strategies, beliefs, attitudes and behaviours” and can be considered to have taken place when a person is capable of doing some action differently (Schunk, 2012:3&4, Hergenhahn & Olson, 2001:1), and theory is “a scientifically acceptable set of principles offered to explain a phenomenon” which provides “a framework for interpreting environmental observations and serves as bridges between research and education” (Schunk, 2012:10), or as McMillan and Schumacher (2014:7) posit, “a prediction and explanation of natural phenomena”, then *learning theory* can be defined as a scientifically determined set of principles, concepts and generalisations that explain the manner in which beings acquire knowledge, skills, attitudes and beliefs that bring about an enduring change in their behaviour or their capacity to perform tasks or functions. The paragraph that follows will expand on this definition by providing an overview of the origins of knowledge and learning theory.

#### **4.2.2 The Origins of Knowledge and an Overview of Learning Theories**

Tracing the origins of learning theory begins with a look at the phenomenon from an epistemological perspective, with epistemology being “the nature of knowledge – its nature and forms, how it can be acquired and how (it can be) communicated to other human beings” (Cohen *et al*, 2011:6). Epistemologically there are two main positions regarding the nature of knowledge and learning – rationalism and empiricism (Schunk, 2012:5, Bryman, 2012:30). Rationalism proposes that all knowledge derives from *reason* and that no knowledge is gained through the use of the senses, with the primary supporters of this position being, among others, Plato, Descartes and Kant (Schunk, 2012:5, Leonard, 2002:64). In contrast to rationalism, also known as cognitivism (Leonard, 2002:29, Kolesnik, 1976:16), empiricism, as proposed by Aristotle, Locke, Hulme and others, posits that *experience*, in other words the use of

the senses (Cohen *et al*, 2011:6, Leonard, 2002:64), is the only source of knowledge and learning (Schunk, 2012:6). From these two epistemological positions stem the two major *schools* of learning theory (Leonard, 2002:115), namely cognitive theories and conditioning or behaviourist theories. However, it must be noted here that the match between the epistemological positions and schools of learning theory is never a perfect one, with overlap often evident between the cognitive- and conditioning schools of theory (Schunk, 2012:7, Hergenhahn & Olson, 2001:47). Because of this overlap, learning theories are most often categorized by means of their most dominant characteristics (Leonard, 2002:115, Hergenhahn & Olson, 2001:48).

Within the school of cognitive theory, four *paradigms* (Hergenhahn & Olson, 2001:47) of learning theory can be distinguished, namely humanism, cognitivism and constructivism (Leonard, 2002:115), together with the school of conditioning theory that centres to a large extent on the behaviourist learning paradigm – diagram 4.1 below provides an overview of the origins of knowledge and how the various modern learning theories stem from these origins.

A discussion of each of the four paradigms of learning theory will assist in explaining both the function of learning theory in the practice and theory of education leadership learning and the function of learning theory within the context of the study being reported on here.

### **4.2.3 Conditioning Learning Theory**

#### **4.2.3.1 Behaviourism**

The majority of conditioning theories fall within the paradigm of behaviourism. Behavioural or association learning theories (Kolesnik, 1976:14), initially developed by Watson, and best known for the work of Pavlov, define learning “as a change in the rate, frequency of occurrence or form of behaviour and response which occurs primarily as a function of environmental factors”, and consider that learning takes place because of “an association between stimuli and responses” (Schunk, 2012:21) driven by “motivational forces in the form of needs, drives and impulses, frequently operating below the level of consciousness” (Bandura, 1977:2).

#### 4.2.4 Cognitive Learning Theories

Cognitive theories, according to Schunk (2012:22), prioritise “the acquisition of knowledge and skills, the formation of mental structures and the processing of information”. From the perspective of this school of learning theories, learning is “an internal mental process” that deals with “the construction, acquisition, organisation, coding, rehearsal, storage and retrieval of information” (Schunk, 2012:23, Hergenhahn & Olson, 2001:47). As mentioned earlier, three paradigms of learning theory can be identified within the school of cognitive theory (Leonard, 2002:115) – each of these will now be discussed in some detail in the paragraphs that follow.

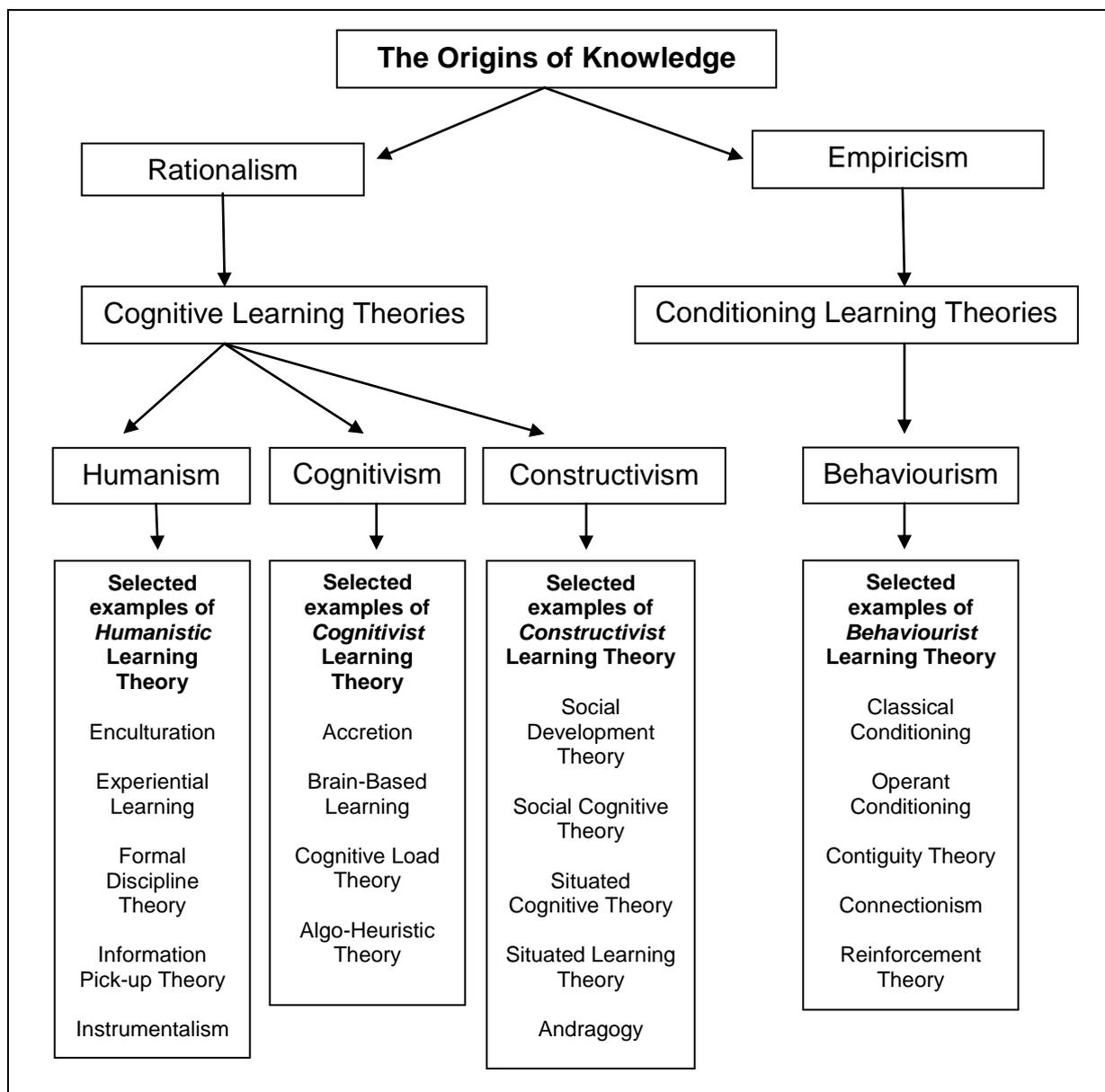


Diagram 4.1: The Origins of Knowledge and Learning Theory (developed from Schunk, 2012 & Leonard, 2002)

#### **4.2.4.1 Humanistic Learning Theories**

The roots of humanism lie in the teachings of Confucius, Aristotle and Erasmus and are supported in the modern era by the work of among others Maslow and Rogers (Leonard, 2002:86). This paradigm of learning theory holds that “human beings have the freedom and autonomy to make choices that positively affect others as well as the ability to advance themselves morally, spiritually, emotionally, physically and mentally” (Leonard, 2002:87) or as Kolesnik (1976:17) puts it, humanistic theories of learning focus on “the distinctly human aspects of personality such as an individual’s uniqueness and capacity for self-determination”. Within this paradigm, knowledge is gained through personal learning experience, and the role of the instructor in any humanistic learning activity is to “foster the student’s self-concept, autonomy, (and) ability to make personal decisions” in order to ensure that the student becomes self-directed and self-learned (Leonard, 2002:87).

As mentioned earlier, the two schools of learning theory (rationalism and empiricism) overlap, and the same is true of the four paradigms of learning theory (Hergenhahn & Olson, 2001:48). In this regard, humanistic learning theories overlap with those found within the constructivist paradigm (to be discussed later) in the sense that in both these paradigms, “the focus is on how to help students construct content” (Leonard, 2002:87). Humanistic learning theory is therefore allied to constructivist theories such as andragogy and discovery learning (Leonard, 2002:86).

#### **4.2.4.2 Cognitivist Learning Theories**

Cognitivist learning theories as developed by among others Piaget, Tolman and Bandura (Hergenhahn & Olson, 2001:49) tend to be more instructor-centric (Leonard, 2002:97) whereas constructivist learning theories (discussed later in this chapter) in the main are more learner-centric (Leonard, 2002:112). The focus of cognitivism is on “the learning inputs and outputs that are processed by the human mind, much as a computer processes information” (Leonard, 2002:29). Learning takes place when an individual gathers information from the world external to him or herself and then builds, within his or her mind, a mental construct or picture of that world, and is dependent on “the accurate transfer of knowledge of the objective reality” from the instructor to the learner. This learning theory posits that people are “neither driven by

inner forces nor buffeted by environmental stimuli” but rather that learning takes place by the “continuous reciprocal interaction of personal and environmental determinants”, with vicarious, symbolic and self-regulatory processes assuming prominent roles (Bandura, 1977:12). Success is measured by the degree to which the learner’s picture and construct of reality matches that of the instructor (Leonard, 2002:30). However, it must be noted that two learners in the same learning situation and receiving the same stimuli, “might respond quite differently because of what they have already learned” (Kolesnik, 1976:16).

#### 4.2.4.3 Constructivist Learning Theories

Constructivism, grounded in the work of Piaget and enhanced by Vygotskian theory posits that learners, whether adults or children, construct their own knowledge through their interaction with “their own ideas and experiences” in their physical and social world (Chaille, 2008:5), or as Schunk (2012:229) contends, “individuals form or construct much of what they learn and understand”. Constructivism, rather than “viewing knowledge as truth, construe it as a working hypothesis”, with knowledge “not being imposed from outside people but rather formed inside them” (Schunk, 2012:231), or as Duffy and Jonassen (1992:3) posit, “meaning is imposed on the world by us, rather than existing in the world independently of us”. Constructivism assumes that people are active learners, and that instructors should therefore not “teach in the traditional sense of delivering instruction”, but should rather create situations in which learners can become actively involved in their own learning (Schunk, 2012:231, Leonard, 2002:37), such situations taking cognisance of the fact that learners’ cognitive processes are and must be contextualised within both physical and social contexts (Duffy & Jonassen, 1992:4). This *situated cognition* “involves relations between a person and a situation” (Schunk, 2012:233), and prescribes that, rather than learning *about* concepts and situations, learners should be learning *within* concepts and situations (Schunk, 2012:234, Leonard, 2002:37).

In summation of this brief discussion of the four major paradigms of learning theory, it is important to note that although “learning theories and educational practice are often viewed as distinct...they should in fact complement one another” (Schunk, 2012:27), because effective instruction or teaching and learning with the aim of ensuring effective learning “requires that we determine the best theoretical

perspectives for the types of learning we deal with” (Schunk, 2012:25), echoing Davis *et al*'s (2005:9) call for the careful consideration of theories of learning when developing education leadership learning opportunities or programmes. In fact, in answer to their own question “Which paradigm is correct?” Hergenhahn and Olson (2001:50) ruefully answer “probably all of them”.

The section that follows deals with ideal or exemplary education leadership learning, and includes both the matter of determining the best theoretical perspectives for such learning as well as the implications of those theoretical perspectives for the selection of appropriate instructional or teaching and learning applications.

### **4.3 Education Leadership Learning - Ideal Practice**

Smylie *et al* (2005:139) contend that “the conventional assumptions and practices of school leadership development are being contested not only in the policy arena but also in the real world of schools”. This statement is the ideal opening for a critical and reflective discussion of the link and relationship between the theory of learning and what the literature in the field of education leadership learning proposes as the features and characteristics of ideal or exemplary education leadership learning.

There is a wide variety of models for- and approaches to the *tools and artefacts*, that is the content, instructional applications of teaching and learning strategies and practices of education leadership learning as a learning activity (Bolam, 2003:79), and this is confirmed by a review of literature on education leadership learning that proves the existence of an extensive literature on what the foundation of ideal education leadership learning should be and also what successful or ideal education leadership learning looks like or should look like. The sections that follow discuss the foundations and features and the *tools and artefacts* in the shape of content and instructional applications or teaching and learning strategies of successful programmes as well as those features, content and teaching and learning methodology considered to be ideal for effective leadership learning - all in relation to some of the global trends in this field.

### 4.3.1 The Foundations of Effective Education Leadership Learning

Smylie *et al* (2005:139) believe that education leadership learning can only be effective when those who develop and implement such learning opportunities or programmes know and have taken into consideration three important factors that form the foundation for effective education leadership learning, namely (a) what capacities school leaders require to perform their tasks effectively, which is the *outcome* of the education leadership learning activity system, (b) what the “social, psychological and cognitive processes” are by which education leaders learn leadership, and (c) the function and relative effectiveness of a variety of different instructional applications, sources and resources that promote and enable education leadership learning, that is the *tools and artefacts* of that activity system.

#### 4.3.1.1 The Capacities Required for Effective Education Leadership

The first of these factors - the capacities required by effective education leaders - begs the question of what effective educational leaders must be able to *do*. If the *object* of education in terms of Engeström’s Activity Theory’s (1987:78) is learning, and the *outcome* in terms of the same theory, achieved through effective teaching and learning at schools, is learners who have “the knowledge, skills and values necessary for self-fulfilment and meaningful participation in society as citizens of a free country” (Department of Basic Education, 2011), then the answer to the question of what effective education leaders must be able to *do* is logically to be found in a review of the literature on the impact of effective education leadership on learner outcomes. Research into the impact of education leadership learning on learner outcomes indicates that effective education leaders have the leadership knowledge, understanding and skills to (a) build a vision for- and set the direction of a school, (b) understand and develop people, (c) redesign and develop the school as an organisation and (d) lead the teaching and learning programme (Bush, 2012:5), and from this it is thus fair to say that education leadership learning activity systems should focus on helping leaders to acquire this knowledge and understanding and these skills as the *outcome* of that system. However, it is most interesting to note here the caution from Smylie *et al* (2005:141) when they state that although academics in the field of education leadership and education leadership learning have “looked at the research on leadership practices associated with student

achievement and school improvement” and have then “inferred the knowledge, skills and dispositions that might be required to enact those practices”, simply knowing what effective leadership practice involves does not mean the same as knowing what capacities are required to be an effective leader where the improvement of student achievement or school improvement are concerned.

#### **4.3.1.2 The Processes by which Leaders Learn**

Smylie *et al's* (2005:139) second factor to be taken into account by those who develop and implement education leadership learning programmes or opportunities - the various processes by which leaders learn – is, as mentioned earlier, further underscored by Davis *et al* (2005:9) who posit that education leadership learning must be framed by appropriate learning theory. In this regard, and from the review of the four paradigms of learning theory discussed above, the researcher posits that, as part of the *tools and artefacts* element of the education leadership learning activity system, the theory of andragogy is of particular interest to the study being reported on here. Falling within the constructivist paradigm of learning theory, this theory, pioneered in the later 1960's by John Knowles (Knowles, 1984:6, Leonard, 2002:7), is relevant to the study under discussion here because of the fact that it focuses specifically on how *adults* learn. It is a learner-centric approach to learning that Tight (1996:103) describes as “the art and science of helping adults learn”.

This theory is based on six assumptions about adults and adult learning. These assumptions and their implications for the education leadership learning activity system as described in Chapter 2 are as follows:

- (a) The need to know – adults become ready to learn when they realise that there is something they must do or *need to know* in order to be able to perform a certain action or function or to perform it better. This need does not, however, have to stem only from the adults' own experience, but can also be induced or created by an instructor when he or she presents a situation or context in which a new skill or knowledge is exposed and introduced (Knowles, 1984:11, Leonard, 2002:7). This readiness to learn or need to know as described above (Knowles, 1984:11) relates to the study of the education

leadership learning activity system at the core of this study in two ways – in the first place it provides a possible explanation for how the participants in this study and indeed the entire *community* within each of the 3 year groups or cohorts of this education leadership learning activity system decided to enrol for the programme, namely a realisation that there is something they must do in order to perform their tasks as education leaders better. In the second place it prescribes to some extent the instructional application or *tools and artefacts* choices open to instructors in such programmes when such instructors design situations in which the education leadership learners develop a need to know or are motivated to learn new skills through the use of for example scenarios, case studies, role play and other similar instructional applications.

(b) The self-concept of the learner, as both the *subjects* (individually) and the *community* (as members of a cohort or year group) of the education leadership learning activity system, generally take on or develop an identity that sees themselves as responsible for their own lives, actions and decisions. They therefore do not like to be told what to do, and feelings of resentment and annoyance can result in learning situations where adults feel as though they are being told what to do (Knowles, 1984:9, Leonard, 2002:8). This assumption, as with the previous one, also prescribed to some extent the instructional applications or *tools and artefacts* open to the instructor - the adoption by an education leadership learning instructor as a role player in the *division of labour* of the education leadership learning activity system of the role of coach and facilitator rather than that of an authoritarian teacher would seem to suit adult learning better, which also serves to confirm the suitability of instructional applications such as those proposed in the previous paragraph.

(c) Adults have life experience – adults have roles and responsibilities that children do not have, and they therefore can lay claim to greater and vastly different experience, which they bring to the learning situations they enter into (Tight, 1996:104, Knowles, 1984:11). This means that each individual represents a rich learning resource or *tool/artefact*, and in the groups or cohorts that make up the *communities* of the education leadership learning activity system, this richness of experience is increased exponentially, again

with great implications for the design and implementation of learning situations and the selection of instructional applications. This tenant of andragogy echoes to some extent the key elements of other learning theories such as for example Vygotsky's social development theory, which holds that the experiences that learners brings to new learning situations or contexts greatly influences the learning that they do in that new situation or context (Schunk, 2012:245), accentuating again the importance of considering and applying appropriate schools and paradigms of learning theory in the development of education leadership learning programmes (Hergenhahn & Olson, 2001:47).

(d) Readiness to learn – adults are and will be more receptive to learning when they make the decision that what they are being presented with will benefit their lives and work (Leonard, 2002:9, Knowles, 1984:10). In practical terms, this means that as with the experience adults bring into a learning activity system, adults' readiness to learn has an impact on the selection of the *tools and artefacts* (content and instructional applications) employed in the education leadership learning activity system.

(e) Orientation towards learning – adults approach learning from a far more practical perspective than do children, and therefore expect learning to be far more practical in nature and application, making contextualisation and relevance to their *real-life* essential (Knowles, 1984:12, Tight, 1996:105). This adult orientation towards learning again has certain implications for both the selection of the *tools and artefacts* that will best serve the education leadership learning activity system, as well as for the *division of labour* within that system, i.e. what the roles will be of, for example, the individual students as the *subjects* of the system, the individual students together as the *community* and of the instructor or instructors.

(f) Motivation to learn – adults are, although responsive to external motivators such as promotion and increased salary, generally self-motivated by intrinsic factors such as improved self-esteem and recognition (Knowles, 1984:12). This assumption about adult learning is closely linked to the assumption that adults become ready to learn when they realise that there is something they

must do or need to know in order to be able to perform a certain action or function or to perform it better, and as such has a bearing on both the learner as a *subject* of the education leadership learning activity system and on the *tools and artefacts* of that system. Within this activity system, the selection and application of the appropriate *tools and artefacts* in the form of appropriate instructional applications and content can lead to the satisfaction of the education leadership learner's "need to know" (Knowles, 1984:11) in order to be able to perform a specific task or to perform it better, which in turn will then serve as motivation for further learning.

Despite the foregoing discussion of the andragogy as a learning theory appropriate to adult learning and therefore to education leadership learning as an adult learning activity, it is important to note that this theory is not the only learning theory appropriate to education leadership learning. Vygotsky's Social Development Theory posits that "social interaction plays a fundamental role in the development of all cognitive abilities, including thinking, learning and communication" (Leonard, 2002:177, Schunk, 2012:242), and also stresses that learning and development cannot be disassociated from the context of the learner or the learning, because it is precisely the interaction of the learner with his or her world – its people, objects and organisations – that transforms their thinking and contributes to their learning (Schunk, 2012:242), and as such this theory's focus on learning as a social and contextualised activity makes it suitable for application in the education leadership learning arena.

Similarly, the Situated Cognition Theory of Brown, Collins and Duguid, which states that learning and cognition are situated, in other words the "*know how* and the *know what* are inextricably intertwined", and practical or working knowledge must be completely connected or tied to conceptual knowledge (Leonard, 2002:173), is also applicable to education leadership learning because of the fact that, in its essence, this theory speaks to the idea that "many processes interact to produce learning" (Schunk, 2012:233), and it therefore prescribes, as does andragogy, that "learning situations must produce knowledge through work activity" (Leonard, 2002:173).

The Situated Learning Theory of Lave, although closely related to the Situated Cognition Theory of Brown, Collins and Duguid, stems from the work of both

Vygotsky and Dewey, and focuses on three presuppositions – (a) classroom learning is by nature de-contextualised and irrelevant, (b) knowledge and skills presented and learned within a contextualised environment such as the work place is more relevant and effective, and (c) the act of learning is a very sociable and interactive activity that should involve a great deal of mentoring and collaboration (Leonard, 2002:174). This theory posits that “the transfer of knowledge is closely tied to the social situation in which the knowledge is learned” (Leonard, 2002:175), and the most effective instructional applications or teaching and learning strategies, according to Lave, are those that involve the use of communities of practice (the use of seasoned practitioners to provide cognitive coaching and apprenticeship learning to novices – Leonard, 2002:32), collaboration (when teams, groups or cohorts work together on a shared learning project - Leonard, 2002:30) and mentoring (Schunk, 2012:235).

These three theories stress the social nature of the activity of learning and also the fact that learning is context-bound and context-dependant, and this adds to their suitability for application in the education leadership learning milieu. However, although andragogy is clearly not the only learning theory appropriate to adult learning or an education leadership learning activity system, in the end this theory’s focus specifically on adult learners and the way in which they learn, as well as the fact that it is primarily learner-centric rather than instructor-centric (Leonard, 2002:112) makes it, in the opinion of the researcher, more appropriate to that activity system than for example Vygotsky’s Social Development Theory, the Situated Cognition Theory of Brown, Collins and Duguid or the Situated Learning Theory of Lave.

Together with the selection of an appropriate theory of learning, the researcher agrees with Smylie *et al* (2005:139), that it is vital for those who develop and implement education leadership learning opportunities or programmes to also take heed of certain common principles - shared across the various paradigms of learning theory - that are believed to have a positive impact on teaching and learning. These common principles and their implications for the education leadership learning activity system can be summarised as follows:

- (a) All learners, including adult learners, progress through stages or phases, and these stages or phases can be linked to either or both the age of the

learner or his or her developmental stage or his or her level of either practical or academic experience (Schunk, 2012:19). This principle serves to again substantiate the arguments of both Smylie *et al* (2005:139) and Davis *et al* (2005:9) who posit that education leadership learning must be framed by appropriate learning theory, and that it should be developed and implemented within the framework of a learning theory appropriate to the level and experience of the intended learners as both the *subjects* and *community* of a particular learning activity system.

(b) The content or learning material to be presented to the learners should be organised into and presented in small sections or steps (Tight, 1996:133). This principle, related to the *tools and artefacts* of a learning activity system, appears to prescribe the modularisation of education leadership learning material and learning experiences, an issue to be discussed in greater detail in section 3.2.2 below.

(c) Learners require opportunities to practice the new skills or applying the new knowledge and also feedback on their own learning based on the results of that practice or application (Schunk, 2012:21). This principle also addresses both the *tools and artefacts* and the *division of labour* elements of a learning activity system, and substantiates the tenant of andragogy which holds that adults approach learning far more practically than children do, and therefore expect learning to be far more practical, contextualised and real-life applicable (Knowles, 1984:12, Tight, 1996:105).

(d) An appropriate social environment facilitates better learning – learning is a social and collaborative activity best undertaken between and among people (Tight, 1996:21). This principle, substantiated not only by andragogy but also, as discussed above, by theories such as Vygotsky's Social Development Theory, the Situated Cognition Theory of Brown, Collins and Duguid and the Situated Learning Theory of Lave, addresses a number of the elements of the education leadership learning activity system. In the first place, the social and collaborative nature of learning speaks to the *community* of that activity system, and in the second place, the importance of the *community* in the

learning activity system has certain implications for both the *division of labour* within that system and the *tools and artefacts* selected for use in that system.

(e) Contextualised learning, i.e. learning that takes place in the real world of the learner and / or the subject being learned, is most effective (Schunk, 2012:22, Tight, 1996:24). This principle, again substantiated by a number of learning theories including andragogy, which posits, as mentioned earlier, that adults approach learning from a very practical perspective and therefore expect learning to be far more practical, contextualised and relevant (Knowles, 1984:12, Tight, 1996:105), is closely related to the previous principle of an appropriate social environment – learning should be both focused on and, as far as is possible, take place within the context of the learners as the *subjects* of any learning activity system. In this sense, the context of the learners is then both the activity system itself (their context and their *community* while they are learning) and the real-life world of each of the learners within the activity system (the context where they live and work). These two contexts in turn have implications for the selection of instructional applications or teaching and learning strategies in that they require instructional applications such as case studies, role playing and scenario-based activities that promote contextualisation within formal teaching and learning situations such as lectures and workshops as well as instructional applications such as internships (Crawford & Earley, 2011:116) and peer mentoring (Brauckmann & Pashiardis, 2011:23, Day & Harrison, 2011:588) that contextualise the education leaders' learning within their real-life world.

It is clear that these common principles have an influence on particularly the choice of instructional applications or teaching strategies selected for effective education leadership learning, and thus on the *tools and artefacts* of an education leadership learning activity system. This influence should not, however, be restricted only to learning seen from for example the andragogical perspective as discussed above, but should indeed be applied within any learning theory deemed appropriate by the developers and implementers of education leadership learning opportunities in order to ensure the selection of the most appropriate and effective instructional applications or teaching and learning strategies.

#### 4.3.1.3 Instructional Applications, Sources and Resources

For the third factor, namely the function and relative effectiveness of a variety of different instructional applications, sources and resources that promote and enable education leadership learning, Smylie *et al* (2005:139) define sources as the providers of- and locations or settings for education leadership learning, while the instructional applications they mention include the practices and experiences used in order to promote leadership learning. The final aspect of this issue, namely resources, they describe as “money, time, curricula, instructional supplies and other tangible materials” (Smylie *et al*, 2005:139). All three of these elements – instructional applications, sources and resources – can be described as part of and as having an impact on the *tools and artefacts* element of the education leadership learning activity system as described in Chapter 2.

The careful selection of instructional applications or teaching and learning strategies referred to by Smylie *et al* (2005:139) is further substantiated by Orr’s (2011:120) identification of one of the features of exemplary education leadership learning as the use of active instructional applications or teaching and learning strategies. It is also closely linked to the selection of a framework for education leadership learning consistent with appropriate learning theory, in the sense that each learning theory prescribes certain instructional or teaching and learning applications. A vast number of such appropriate and effective instructional applications or teaching and learning strategies are available to those responsible for the development and implementation of education leadership learning programmes, and these are discussed in detail in section 4.3.2.3.2 below.

The discussion that follows builds on this foundation for education leadership learning described by Smylie *et al* (2005:139) in that it describes the features of ideal education leadership learning.

#### 4.3.2 The Features of Ideal Education Leadership Learning

Orr (2011:120), in her summary of the features common to exemplary education leadership learning programmes, identifies seven such features, namely a clearly defined theory of leadership, a coherent curriculum, the use of active instructional

applications or teaching and learning strategies that integrate theory and practice, quality internships that provide education leadership students with the opportunity to apply newly-learned knowledge and skills, knowledgeable presenters, support structures within the programme such as the use of cohorts and finally the use of student- and programme feedback to facilitate continuous improvement of the programme. These features will serve as the outline for the discussion of ideal education leadership learning practice, however, because some of these features are closely related and show a substantial degree of overlap, some of them will be combined for the purposes of clarity and logical sequence. These features also serve admirably to further illustrate the *artefacts and tools* element of Engeström's Activity Theory (1987:78) as represented by the education leadership learning activity system that served as the activity system for this study.

#### **4.3.2.1 A Well-Defined Theory of Leadership**

Orr (2011:120) posits that the first feature common to exemplary education leadership learning programmes is that they are framed by a well-defined theory of leadership that focuses on school improvement. Such a theory, she continues, serves to integrate all the other features of the programme and assists with the creation of a set of values, beliefs and content that make up the core of such a programme. In the same vein, Earley and Jones (2010:x) allude to a clearly communicated and all-encompassing purpose or mission statement around which all education leadership learning programmes should be designed, while Crawford and Early (2011:108) refer in this regard to "a powerful, guiding vision" and Davis *et al* (2005:8) to a specific philosophy that should underpin ideal education leadership learning programmes. These statements tally with Huber's (2010:238) belief that, as a trend in education leadership learning, "an important paradigm shift has occurred: from focusing on *managing* (own italics) schools with an emphasis on maintenance, to a focus on *leading and improving* (own italics) schools".

While many theories of education leadership attempt, as theories do, to predict and explain (McMillan & Schumacher (2014:7) the phenomenon of education leadership, Imants and de Jong (Huber, 2010:673) and Huber (2010:669), when they refer to the complex integration of leadership and management tasks discussed in Chapter 3 as

“integrated school leadership” or as “professional school leadership” respectively, are in fact referring to the concept of *instructional leadership* – school leadership actions and activities that focus on the learning progress of learners and that encompass management as well as leadership-orientated roles, activities and functions directed toward such progress (Southworth, 2002:77, Huber, 2010:673). Jacobson (2011:34) describes instructional leadership as “the linchpin” between school leader practices and learner achievement. The most widely accepted model of instructional leadership was proposed in the year 2000 by Hallinger (2010:332). In this model he proposes three dimensions for this form of leadership – (a) defining the school’s mission, (b) leading and managing the instructional programme and (c) promoting a positive and enabling school climate (Hallinger, 2010:332). The second of these dimensions – leading and managing the instructional programme, lends credence to both Bush’s (2007:400) belief that the increasing focus within the education sector on the process of leading teaching and learning as the primary function of schools has led to the emergence and increase in importance of the theory of instructional leadership, and also to Steyn’s (2008:895) statement that, although international perspectives on educational leadership differ, there appears to be movement away from the traditional perspective that views the principal as primarily a manager towards the perspective of a principal as an instructional leader with a strong focus on leading teaching and learning in schools.

But what does the practice of instructional leadership actually entail? In this regard, Hallinger, Leithwood and Heck (2010:22) paint a comprehensive picture of an instructional leader and instructional leadership with their seven foci for an instructional leader, namely (a) creating a shared sense of purpose and clear goals focused on teaching and learning, (b) advocating, planning and managing the continuous improvement of the school, (c) fostering a positive school climate and a culture of high quality and innovative teaching and learning, (d) coordinating the development and implementation of the curriculum, (e) shaping a rewards structure for the school that suits the culture and vision of the school, (f) planning, organising, managing and controlling a wide range of staff developmental activities and (g) being a visible presence, modeling to all stakeholders (staff, learners and parents) the desirable values and attitudes of the school’s culture.

Botha's (2004:240) take on the functions of an instructional leader include (a) defining and communicating objectives, aims and a goal for the school, (b) managing the curriculum, (c) supervising teaching, (d) monitoring and evaluating both the learning programme and learners' results, and (e) promoting an institutional climate conducive to effective teaching and learning.

Both Botha's (2004:24) and Hallinger *et al*'s (2010:22) instructional leadership functions echo the three dimensions of this leadership theory proposed by Hallinger in 2000 (Hallinger, 2010:332) – Botha's suggestion that an instructional leader must manage the curriculum, supervise teaching and monitor and evaluate learning programmes and learner results matches Hallinger's second dimension (leading and managing the instructional programme – 2010:322), as does Hallinger and his co-authors' assertion that instructional leaders should coordinate the development and implementation of the curriculum (Hallinger *et al*, 2010:22). Both Botha and Hallinger *et al* also refer to Hallinger's (2010:332) first dimension, namely defining the school's mission when they mention that instructional leaders should define and communicate objectives, aims and a goal for the school (Botha, 2004:24) and should create a shared sense of purpose and clear goals focused on teaching and learning (Hallinger *et al*, 2010:22).

Having discussed instructional leadership at some length, attention must now turn to what Hoadley *et al* (2009:377) state is at the core of this theory, namely distributed leadership. Hoadley *et al* (2009:337) believe that instructional and distributed leadership together form the ideal foundation for effective leadership in education, a belief substantiated by Hallinger *et al* (2010:22) when they state that both practical experience and the results of empirical studies suggest that instructional leadership is a role the principal, as the primary school leader, should share with or distribute to school leaders at all the levels of the school. Hallinger *et al* (2010:19) explain the link between instructional and distributed leadership as the result of the fact that, as the scope of education and the sheer size and complexity of schools increased, it became impossible for the principal to both manage and carry out all the instructional leadership tasks and functions him or herself, and that these tasks and functions therefore had to be distributed or shared with other role players or leaders within the schools. This link between instructional and distributed leadership is further

strengthened by Coleman (2003:162), who indicates the existence of two axes of leadership activity - one axis involves leadership activity that is concerned with people and relationships and the other is concerned with the product and results. In the education leadership context, the theory that addresses the axis of product and results, i.e. the teaching and learning which is the core function of education, is instructional leadership. Using the same analogy, distributed leadership theory refers to the axis of people and relationships.

One of the major exponents of distributed leadership is Spillane. He believes that distributive leadership is “about leadership *practice* (own italics) rather than about leaders and their roles, functions, routines and structures” (Spillane, 2005:143) and that this practice encompasses the manner in which school leaders interact with their followers and any given situation they encounter (Spillane, 2005:144). This leadership practice, he continues, acknowledges that multiple role players within the school must be allowed to take leadership responsibility for various activities and actions within the school (Spillane, 2005:144). Davies, Darling-Hammond, LePointe and Meyerson (2005:165) define distributed leadership as “multiple sources of guidance and direction, following the contours of expertise in an organisation”. These authors further contend that “many people in leadership activity are at the core of distributed leadership in action” (Davis *et al*, 2005:166). Jacobson (2011:35) summarises this debate about distributive leadership well when he posits that the concept of school leadership no longer refers merely to the leadership role of the principal or headmaster as the official designated or appointed to fulfill the task of leading a school or as “the possession of power and authority based on hierarchical status” (Fitzgerald & Gunter, 2008:336), but rather that the concept of school leadership refers to “a collective construct that can be distributed among teachers and support staff”. Finally, Leithwood, Harris and Hopkins (2008:27), in their seven strong claims about school leadership, claim that “school leadership has a greater influence on schools and students (learners) when it is widely distributed”, and that distributed leadership practice accounted for as much as 27% of the variation in learner performance noted in a 2007 study by Mascall and Leithwood (Leithwood *et al*, 2008:34).

Spillane's reference to this leadership practice also having to take place within and being dependent on specific situations links with the concept of contingent or situational leadership described by Leithwood *et al* (2008:15). Contingent leadership, sometimes referred to as situational leadership, assumes that what is paramount is that education leaders respond to different situations and contexts or organisational circumstances differently and appropriately, thus requiring a leader to tailor his or her response to the specific demands and characteristics of any given situation or context (Bush, 2007:402). In this regard, Coleman (2003:161) states that there should be "a relationship between the appropriate leadership style and the context in which that leadership style is being exercised". The views of both of these authors are corroborated by Steyn (2008:895) when she suggests that there is a discernable move in leadership and management literature away from a narrow focus on the managerial functions and responsibilities of education leaders towards a broader focus on school leaders as both instructional leaders and as leaders who employ participative and collaborative leadership and management practices. This broadening of the leadership role and the need for school leaders to be adaptable and to act according to and work within different contexts and situations is re-iterated by Brauckmann and Pashiardis (2011:15-16) when they describe the five most important sets of leadership activities (or *styles*, as they call them) "across the leadership radius", these being instructional activities, structuring activities, participative activities, entrepreneurial activities and personnel development. Each of these sets of leadership activities acknowledge that school leaders "do not operate in a vacuum", and that context and situation is, or at least should be, an important determinant of school leaders' leadership actions and practices (Brauckmann & Pashiardis, 2011:13).

This concept of participation in leadership and the distribution of leadership roles and functions is by no means new to the South African education milieu – The Task Team on Education Management Development reported in 1996 that "new education policy requires managers who are able to work in democratic and participative ways to build relationships and ensure efficient and effective delivery" (Department of Education, 1996:25).

In summation, the instructional and distributed leadership theories prescribe school *leaders* who focus on and are deeply involved in the core business of schools, namely teaching and learning. The plural (*leaders*) is used here to indicate the fact that, in effective schools, leadership responsibilities are distributed among competent staff members so that the principal or headmaster is no longer required to run the traditional *one-man-show* (Steyn, 2008:895, Jacobson, 2011:35) or act as the *heroic leader* (Spillane, 2005:142). The credibility of the instructional leadership theory has been firmly established by research - this can be seen clearly in the link between the roles of the instructional leader as defined by Botha (2004:240) and Bush (2007:400) and both the core dimensions of school leadership identified by Leithwood *et al* (2008:29), namely setting direction, developing people, redesigning the organisation and managing the instructional programme”, and the activities described by Robinson and her co-researchers (2008:27-30) as having the greatest impact on learner success and school success, namely establishing goals and setting clear expectations for all stakeholders, planning and using both human and material resources strategically, planning, coordinating and evaluating both the teaching and the curriculum, promoting and participating in programmes that develop teacher and school leader skills and competencies, and creating and maintaining a safe and supportive learning environment at school. It is also important to note in this regard the correlation between Robinson *et al*'s (2008:27-30) activities and Brauckmann and Pashiardis (2011:15-16) five most important sets of leadership activities describe - these correlations are set out in the table 4.1 on page 121.

This correlation is further substantiated by the results of research conducted by Jacobson (2011) and by Sammons, Gu, Day and Ko (2011). Jacobson (2011:34) states that research into effective schools shows that school leaders who lead such schools “work(ed) tenaciously to create safe and orderly learning environments; set clear instructional objectives; expect high performance from teachers and students and develop positive home-school relationships”, while Sammons *et al* (2011:92-93), in their study of the impact of school leadership on learner outcomes, identify, in line with the findings of Robinson *et al*, (2008) and Leithwood *et al* (2008), among other leadership actions (a) the strategic provision and allocation of resources, (b) promoting continuous professional development for teachers, (c) improving instructional aspects such as assessment practices and curriculum and (d)

monitoring teachers and teaching as practices that have the greatest impact on learner performance.

From this discussion it is also evident that the instructional leadership practices described above have the greatest impact when school leaders share or distribute their leadership responsibilities with and to other role players in the school (Spillane, 2005:143, Davis *et al*, 2005:166, Brauckmann & Pashiardis, 2011:16), with each of these role players then acting and reacting as co-leaders to each individual situation within the school leadership context in an appropriate context- and situation specific manner. This distribution of leadership roles and functions across role players and contexts or situations ideally takes place within the framework of instructional leadership and the overall context of efficiently and effectively leading the core business of the school, which is teaching and learning.

However, while the preceding discussion on the role of instructional leadership and distributed leadership theory in effective schools illustrates the roles and responsibilities of effective education leaders and also speaks, as mentioned earlier, to what is required of education leadership learning for it to be effective in producing such education leaders, it must be noted that instructional leadership and distributed leadership theory are *not* the only theories that explain the phenomenon of education leadership. Indeed, Hallinger (2010:330) states that two major approaches to leadership in education have predominated in the last 25 years, one being *instructional leadership* (as discussed above) and the other *transformational leadership*. With regard to transformational leadership, it is interesting to note that Northouse (2004:170) distinguishes between leadership theories on the basis of the nature of the interaction between leaders and followers, and in this way he identifies two main types of leadership, namely transactional and transformational leadership theory.

Robinson <i>et al</i> (2008)	Brauckmann and Pashiardis (2011)
Establishing goals and setting clear expectations of all stakeholders (2008:27)	Instructional activities - developing and implementing a learning mission and aligning teaching and learning with specific goals (2011:15) Structuring activities - providing coordination and direction, and setting standards for both staff and learners (2011:15)
Planning and using both human and material resources strategically (2008:28)	Structuring activities - making sure that facilities are maintained (2011:16) Participative activities - encouraging a culture of cooperation, participation and participative decision-making (2011:16) Entrepreneurial activities - building and maintaining networks <i>within</i> (staff and parents) and <i>outside</i> (other schools, service providers) the school (2011:16)
Planning, coordinating and evaluating both the teaching and the curriculum (2008:28)	Instructional activities - monitoring and evaluating teaching and learning (2011:15)
Promoting and participating in programmes that develop teacher and school leader skills and competencies (2008:29)	Personnel development activities - providing both intellectual and teaching support and development (2011:16)
Creating and maintaining a safe and supportive learning environment at school (2008:30)	Structuring activities - implementing standard procedures and policies that assure a safe and orderly environment (2011:16)

Table 4.1 - Instructional leadership activities

While the former focuses on exchanges between leaders and followers that are transactional in nature, in other words the followers are bound to receive something from the leader in exchange for their support (politicians promising the voters a tax

rebate, or teachers giving learners grades, for example), transformational leadership focuses on the fostering of relationships between leaders and followers in order to “raise the level of motivation and morality in both the leader and the followers” (Northouse, 2004:171). In educational terms, Hallinger (2010:335) posits that transformational leadership is made up of seven components, namely “individualized support, shared goals, vision, intellectual stimulation, culture building, rewards, high expectations and modeling”. These components substantiate Northouse’s (2004:170) concept of transactional leadership as the interaction and motivation of leaders and followers with the inclusion of matters such as goals shared by both leaders and followers and culture building, both of which suggest relationship rather than reward, as would be the case in for example a transactional leadership situation. It is interesting to note, however, that both instructional leadership and transformational leadership are noted for their *distributed* nature (Hallinger, 2010:339), emphasizing the claim by Leithwood *et al* (2008:27) in their seven strong claims about school leadership that although there are a number of theories of leadership that can explain and prescribe leadership behavior and practice in the education environment, leadership that is *distributed* as described above, is a powerful and effective type of leadership.

#### **4.3.2.2 Curriculum Coherence**

Both Orr (2011:120) and Robey and Bauer (2013:264) substantiate the discussion above on the theory of leadership with the greatest currency when they state that exemplary education leadership learning programmes generally feature a coherent curriculum that is underpinned by the theory of instructional leadership, therefore promoting, with a curriculum based on this theory, effective leadership of teaching and learning and the development and improvement of schools.

Davis *et al* (2005:8) describe a programme with curricular coherence as one where there is a clear link between the aims and objectives of the programme, the learning content and learning activities or instructional applications and the shared values and beliefs encompassed in the underpinning philosophy or theory of leadership. As mentioned earlier, they posit that such programmes often present a logical sequence

of course work and learning activities that link theory to practice within a framework of adult learning theory (Davis *et al*, 2005:9).

Huber (2010:230) identifies the increased degree of coherence in programmes evident in many countries as the result of improved cooperation between universities, educationalists and education leaders at both school and professional organisations level as a global trend in education leadership learning, and posits that this cooperation has contributed to the development of the content, teaching and learning strategies and learning methods of such programmes, promoting improved curriculum coherence.

Any discussion of the ideal curriculum for education leadership learning will naturally lead to a discussion of the content of education leadership learning programmes. The changing nature and responsibilities and the ever-increasing complexity of the role of a school leader has made training of such leaders for a fixed role obsolete (Huber, 2010:236). In order to overcome this problem, Davis *et al* (2005:8) and others (Mansfield & Carpenter, 2008:4) believe that the curriculum and content of education leadership learning programmes should be based on and reflect the current research on education leadership and should also be aligned with the programme's underpinning philosophy or theory of leadership. This is substantiated by Bush and Moorosi (2011:70) when they state that education leadership learning for the future must include "emergent and context-responsive learning" and by Pounder (2011:263) who states that the content of education leadership learning programmes should be challenging and should have a strong focus on instructional leadership.

As early as 2002, Bush and Jackson (2002:412) contended that "the content of educational leadership programmes has considerable similarities in different countries, leading to the hypothesis that there is an international curriculum for school leadership preparation", an opinion mirrored by Paterson and West-Burnham (2005:110). Bush and Jackson (2002:413) continued to state that most education leadership learning programmes at that stage "focused on leadership, including vision, mission and transformational leadership, giving prominence to issues of teaching and learning (*instructional leadership*) and incorporating a consideration of the main task areas of administration or management such as human resource

management, professional development, finance, curriculum and external relationships”. This substantiates the global trend that sees many education leadership learning programmes globally now including components such as the development of a personal vision for education and the development of fundamental values, as well as components aimed at developing leaders’ ability to self- and time manage and to reflect on their own practice (Huber, 2010:237). With the global shift in the perception of school leaders as experts in administration to one of school leaders as experts in communication and cooperation (Huber, 2010:237), topics such as communication, collaboration, motivation, cooperation and collegiality have become essential components in modern education leadership learning programmes, with a growing international awareness that the understanding of these components of the school leadership role is essential in becoming a successful school leader (Huber, 2010:237).

A more recent study (Bush & Moorosi, 2011:68) identified the following similarities in topics across the countries of the Commonwealth - (a) school improvement and effectiveness, (b) leadership for and of learning, (c) effective leadership and management, (d) team leadership, (e) leadership and management theory, (f) human resource management, (g) education policy and (h) financial management. These findings accord to a large extent with a 2012 study (Bush, 2012:6) which investigated the content of education leadership learning programmes in nine countries, among them South Africa. This study found that more than half of these programmes included topics or courses in (a) instructional leadership, (b) the law of education, (c) finances in education, (d) the management of people and (e) school administration as a leadership function. The overlap of topics illustrated above substantiates as a global trend in education leadership learning the emergence of a more modular approach to such learning (Huber, 2010:235), with modules of content often developed and organised as a result of “the needs that become evident during the different stages of a school leader’s career”, but also on the basis of the needs of the school that he or she serves and any new research in the field of education leadership (Huber, 2010:234). These findings and this global trend also substantiates one of the common principles, discussed earlier, that are believed to have a positive impact on teaching and learning, namely that the content or learning material for all

learning activities, including education leadership learning activities, should be organised into and presented to learners in small sections or steps (Tight, 1996:133).

Therefore, if ideal education leadership learning programmes require a coherent curriculum (Orr, 2011:120) and content derived from and informed by recent research (Davis *et al*, 2005:8) and must be underpinned by a suitable theory of leadership such as the theory of instructional leadership (Orr, 2011:120, Robey & Bauer, 2013:264, Pounder, 2011:63), then the list of topics and course proposed by Bush (2011:68 and 2012:6) can be seen as a good starting point for the development of the ideal education leadership learning programme. However, because, in the opinion of Brauckmann and Pashiardis (2011:23), module or course-based programmes have a tendency to be too theoretical, such programmes should be augmented by instructional applications or teaching and learning strategies such as “problem-based learning, mentoring, coaching and peer networking as well as experiential learning activities” (Brauckmann & Pashiardis, 2011:23). These active instructional applications or teaching and learning strategies are discussed in some detail in the section that follows.

#### **4.3.2.3 Active Instructional Applications and the Provision of Quality Internships**

The third and fourth features of exemplary education leadership learning programmes suggested by Orr (2011:121) are both closely linked to the matter of a coherent curriculum, and involve the use of “active teaching and learning strategies that integrate theory and practice and stimulate reflection” as well as of “quality internships that provide intensive, developmental opportunities to apply leadership knowledge and skills under the guidance of an expert practitioner”. The first of these two features, although essentially about the instructional applications or teaching and learning strategies - as part of the *tools and artefacts* of a learning activity system - that should be employed in effective education leadership learning programmes, also touches on two important debates. In the first place, it touches on a debate that has raged since the early days of education leadership learning literature, namely the issue of the importance and place of theory and practice in such programmes, and in the second place it touches on the matter of the context within which education leadership learning is presented. The second of these two features - that of the

provision of quality internships - is linked to both the active instructional applications and teaching and learning strategies of a programme and also, like the first feature, to the matter of context.

The matter of theory versus practice will be addressed first, after which the ideal instructional applications or teaching and learning strategies and the context of education leadership learning together with the matter of quality internships will be discussed.

#### 4.3.2.3.1 Theory versus practice

Huber (2010:230) identifies the increasing combination of the theoretical and the practical aspects of education leadership learning programmes as a global trend in this field, because “only a balanced model (of learning) leads to participant satisfaction, making the dovetailing (of the) theoretical and practical aspects essential for designing effective development programmes which aim at changes in the participants’ behaviours and dispositions through the process of teaching and acquiring knowledge” (Huber, 2010:230). In his opinion, theory and practical experience “are interdependent and therefore have to be developed together” (Huber, 2010:231). Many programmes, it is clear, are moving away from a focus on either the theoretical *or* the practical towards a balance between these two aspects (Huber, 2010:239), with many programme developers now designing the instructional applications and learning experiences for their participants in such a way that they become involved in “learning environments that offer the opportunity of deliberately linking and embedding new information in previous experiences”, with the participants’ own experiences and challenges forming the point of departure for the design and selection of content and learning methods or *tools and artefacts* that are to be used (Huber, 2010:239).

Glatter (2009:226) states that leaders rely heavily on both what he calls *formal* (explicit or public) and *informal* (tacit or personal) knowledge. His contention is that much of the knowledge most useful to a school leader is personal knowledge - knowledge that resides within the leader and was gained for the most part through observation and experience of- or participation in leadership roles, activities and

functions. This personal knowledge is far more difficult to transfer than public or formal knowledge such as knowledge of different leadership theories or knowledge of the procedures for leadership functions such as effective communication or educator motivation. This personal knowledge implies what Glatter (2009:226) refers to as “a maturity of judgement, sometimes called *wisdom*”. Research by Cave and Wilkinson in 1992 (Glatter, 2009:227) revealed that apart from the more obvious areas of knowledge and types of skills required for the competent performance of leadership roles and functions, “above-average performers were considered to possess in addition certain cerebral or higher order capacities” that included the ability to read a situation effectively, the ability to provide balanced and fair judgements, a strong sense of intuition and a certain amount of political acumen. This led Glatter to conclude that such higher order capacities or “craft knowledge” (Glatter, 2009:228) are essential to the appropriate application of skills such as building sound human relationships and knowledge of for example the legal framework for the management of school finances to the “complex situations in which school leaders find themselves daily” (Glatter, 2009:228). The importance of these experiential capacities, this leadership *wisdom* that is gained primarily through experience and practice, must not and cannot, he contends, be ignored when planning and developing education leadership learning programmes (Glatter, 2009:228). This is confirmed by both Brundrett (2000:364) and Smylie *et al* (2005:143), with the former positing that, whilst there may be groups of nodal skills and knowledge which can be identified, imparted and assessed, the effective educational leader must be assisted in the development of broader intellectual abilities that may assist in solving the problems that face his or her school - the effective education leader must become in effect a practically effective theorist, and Smylie *et al* (2005:143) stating that although technical or theoretical knowledge is important, it is insufficient for effective school leadership practice if not accompanied by well-developed craft knowledge. Finally in this regard, Browne-Ferrigno (2003:470) emphasises the need for balance when she states that the transition from teacher to education leader “requires a careful balance of knowledge development through classroom activities and skills development through situated learning activities”, while formally delivered content or classroom activities should strive to and be aimed at making meaning of the more practical or experimental learning activities.

A practical example of this link between theory and practice can be found in the Finnish education system, which requires the completion of the school management and administration diploma before appointment as principal at both primary and secondary schools (Derring *et al*, 2005:34). This programme, although offered in various forms and guises by numerous universities, educational centres and other education institutions, involves both theoretical courses offered by universities and also practical on-the-job learning with a strong emphasis on mentoring (Derring *et al*, 2005:34).

In seeming contrast to this focus on education leadership practice at the cost of theory, Bush in 2003 (Bush & Glover, 2003:228) warned that although a solely theoretical programme on professional educational leadership would provide a very shallow opportunity for authentic education leadership learning, institutions developing and presenting such programmes should guard against discarding or minimising the theoretical component of such programmes. This is confirmed by Walker and Dimmock (2006:82) when they state that education leadership learning programmes that fail to connect theory and practice are in danger of lacking relevance and therefore also effectiveness, and by Paterson and West-Burnham (2006:110) who cast doubt on the relevance and effectiveness of what they refer to as “content-rich” or content-dominated education leadership learning programmes. Indeed, Bush and Glover (2003:228) advocated most strongly the essential role of theory in effective education leadership learning.

With regard to the matter of theory and practice, Brundrett (2000:365) distinguishes between the “*know-how* (own italics) of operational competence and the *know-that* (own italics) of academic competence” and advocates that both of these concepts are essential in education leadership learning. This is substantiated by Brown, Collins and Duguid, developers of the situated cognition learning theory, when, as mentioned earlier, they state that learning and cognition are both situated, in other words the “know how” and the “know what” are “inextricably intertwined” (Leonard, 2002:173). Crawford and Earley (2011:108) describe several challenges to the development and delivery of education leadership learning programmes, one of them being this very issue of the critical need to strike a balance between the academic or theoretical and the practical aspects of education leadership learning.

Bush and Jackson (2002:424) found that many education leadership learning programmes make an explicit link between theory, research and practice. So for example the Swedish Principals' Leadership Programme was found to make use of tutors who worked closely with participant school leaders' professional experiences in order to assist them in building links between their practice and experiences and the theory they had been taught. These tutors were usually experienced school leaders who themselves had completed a master's degree and in many cases were now PhD students. This link between "work and the learning situation" is a feature, according to Rhodes and Brundrett (2009:365) of successful education leadership learning experiences.

Consensus appears then to agree with Crawford and Earley (2011:108), in that a balance between the theoretical and the practical is required in the development of education leadership learning programmes in order for such programmes to be effective in preparing school leaders for the tasks they will face in the global schools of the 21st century.

#### 4.3.2.3.2 Instructional applications/teaching and learning strategies

As mentioned above, the instructional applications or teaching and learning strategies of ideal education leadership learning overlap to a substantial degree with the feature of quality internships, and these two features will therefore be discussed together.

This feature of ideal education leadership learning echoes some of the tenants of the constructivist paradigm of learning theory in that it posits that programme developers and implementers should, rather than focus on formal instruction, create situations in which learners can become actively involved in their own learning (Schunk, 2012:231, Leonard, 2002:37). Bush and Jackson's 2002 study of fifteen (15) education leadership learning programmes highlighted the diversity and abundance of instructional applications or teaching and learning strategies in such learning. These instructional applications or teaching and learning strategies included, *inter alia*, contact courses, online provision, mentoring, coaching and internship, the use of study groups and action research and tutoring. (Bush & Jackson, 2002:427).

However, as far as instructional applications or teaching and learning strategies are concerned, the emphasis in the 21st century appears to have shifted from *what* is taught (content) to *how* the content is designed and delivered (Bush, 2012:6), corroborating to some extent the global tendency identified by Huber (2010:233) towards far more extensive and comprehensive education leadership learning programmes.

Education leadership learning programmes can take on a multitude of different forms, such as formal training at certificate or diploma level (South Africa, Malta, England, Finland) or postgraduate level (the United States of America, South Africa) as well as on-site training, seminars, workshops, probationary appointments, clinical experiences, shadowing, mentoring and networking (Mathibe, 2007:523, Bush, 2012:10). The diversity of education leadership learning instructional applications or teaching and learning strategies adopted globally can, according to Bush and Moorosi (2011:62), be ascribed to the different conceptualisations of both leadership in education and of education leadership learning, despite the earlier contention that there appears to be an international curriculum for education leadership development (Bush & Jackson, 2002:412). A few of these instructional applications or teaching and learning strategies will now be highlighted in order to present an overview of these in relation to both ideal education leadership learning and learning theory.

Day (2001:588) found that in 2001 the formal classroom-based education leadership learning programme in which the basic principles of leadership were presented, was the most common approach to such learning, with an estimated 85% of organisations involved in education leadership learning making use of this format at that time. Although obviously popular then, Day and Harrison (2011:457) contend that the graduates of such programmes “suffered issues with the transfer of knowledge from the classroom to the job”, and that this instructional application or teaching and learning strategy is therefore “not completely adequate for effective leadership development”. Despite this possible difficulty in transfer from theory to practice though, Burgoyne and Williams (2007:10) suggest that education leadership learning programmes should, in an effort to strike a balance between theory and practice, include what they call “input driven sessions” – sessions or parts of the programme during which theoretical information is delivered to students using *tools and artefacts*

such as for example PowerPoint presentations, discussion of academic articles or government policy, as well as more experiential learning-orientated sessions that include instructional applications or teaching and learning strategies such as coaching, mentoring, project-based work and action research.

Another instructional application or teaching and learning strategy used in education leadership learning programmes is multi-source or 360-degree feedback, a strategy that aims at enhancing the self-knowledge of leaders by providing them with feedback and assessment from many others at different leadership levels or fulfilling different roles in the organisation being led (Day & Harrison, 2011:457). This strategy calls for the systematic collection of ratings of performance from all members at all levels of the organisation (peers, supervisors, subordinates) in order to “compile a comprehensive 360-degree picture of the leader’s ability and behaviour”. This picture is then used to enhance the individual leader’s self-knowledge and bring about behavioural change. Although this method allows for broad participation and provides a comprehensive picture of the individual leader’s performance and education leadership learning needs, an overload of data and the lack of guidance on how to change leadership behaviour are drawbacks of this method. Day and Harrison (2011:458) suggest that the use of what they call an “executive coach” is often required to assist leaders with their learning from this instructional application or teaching and learning strategy. The use of such an executive coach speaks directly to the quality internships feature of ideal education leadership learning identified by Orr (2011:120), as does the strategy of coaching, which is defined by Day and Harrison (2011:459) as one-on-one learning opportunities focused on practical and attainable goals aimed at the enhancement of self-knowledge and the bringing about of behavioural change. However, although this practice is personalised and very intensive, which appears to enhance its value as an instructional application or teaching and learning strategy of education leadership learning, the assigning of a coach to an employee often comes with the stigma of remedial action (Day & Harrison, 2011:459).

According to Paterson and West-Burnham (2006:111), mentoring “shows the strongest evidence for efficacy” as an active instructional application or teaching and learning strategy for education leadership learning. This is substantiated by Bush

(2012:8) when he states that, along with networking, coaching and facilitation, mentoring is among the strategies that are used most effectively in a variety of countries around the world. Mentoring is a well-established and important feature of the ACE:SL programme in South Africa and other similar programmes in several countries including the United States of America and Singapore (Bush & Moorosi, 2011:425), and is another instructional application or teaching and learning strategy that speaks to the issue of quality internships identified by Orr (2011:120) and by Davis *et al* (2005:9) as a feature of ideal education leadership learning. Mentoring is defined by Day and Harrison (2011:588) as the practice of a more senior leader (mentor) involving him-or herself in an advisory and developmental relationship with a less senior or less experienced leader (mentee), and can take on many different forms, including counselling, peer support, socialisation, internship and coaching (Bush & Jackson, 2002:425). The aim of mentoring is to create a broader understanding in the mentee and to create the opportunity for him/her to learn from the experience and mistakes of the mentor (Davis *et al*, 2005:9, Day & Harrison, 2011:588). To bring this about, Walker and Dimmock (2006:131) suggest that mentors should be experienced education leadership practitioners who are supported by academics and were involved in the design, implementation and review of the programme. They also suggest that such mentors must have very clearly defined roles during the implementation phase of the programme (Walker & Dimmock 2006:134). The focus of these mentors should be *real life* – making the content and the theory real for mentees within their own school and social context.

Networking and creating networks involves (a) connecting members of organisations internally within as well as across roles, levels, positions and functions as well as (b) with connecting with members of other similar organisations in order to enhance both socialisation and an understanding of the value of team work, collaboration, improved resources and problem-solving (Day & Harrison, 2011:459). Although this active instructional application or teaching and learning strategy can build organisational and individual capacity, it is often used in an unstructured and *ad hoc* manner. Bush, Glover and Harris (2007:87) report that “networking, either through face-to-face events or through purposeful school visits”, is often rated by students of education leadership learning programmes as among the most popular and valued activities within such programmes, while Earley and Weindling (2007:4) found that what school

leaders valued most was “working with others, especially other school leaders who are known to be effective” and the opportunity to visit other schools and to network with other leaders. Use must be made, posit Walker and Dimmock (2006:155) of both formal and informal groups and networks - formal groups and networks being groups and networks purposefully constructed from- and for participants in a programme, while participants must also be encouraged to construct or join informal groups within or outside of the programme in order to satisfy their own desire for interaction with others in the same or largely similar school, social and or cultural contexts. A suitable way of facilitating networking and networks and at the same time effectively overcoming the inherent problem of a lack of structure in this strategy (Day & Harrison, 2011:459) is to operate education leadership learning programmes in cohorts (Lauder, 2000:115), a suggestion supported by both Orr (2011:120) and Davis *et al* (2005:9), with the latter stating that “adult learning is best accomplished when it is part of a socially cohesive activity structure that emphasises shared authority for learning, opportunities for collaboration and team work”. This ties in well with the trend in global education leadership learning towards the use of small and large group interaction in cohorts in order to promote experiential learning and the development of reflection skills among both prospective and current school leaders (Huber, 2010:237). Huber (2010:237) presents peer assisted learning, peer coaching, critical partnerships, shadowing and mentoring and the use of peer networks as methods of promoting the interaction required.

The use of the active instructional application or teaching and learning strategy of action learning, field-based experiential learning and quality internships is endorsed by a number of authors in the field (Orr, 2011:120, Davis *et al*, 2005:8). In this regard, Zhang and Brundrett (2010:155) suggest that it is time to turn the attention away from formal leadership development to real-world education leadership learning within schools. They make this statement on the strength of comments made by participants in their study that examined the perceptions of school leaders about the best ways of enhancing school leadership skills, reporting that “an almost ubiquitous response from respondents indicated that leadership learning arose out of a variety of informal routes such as group work, learning communities and collaborative work within and across schools”. Lauder (2000:27) suggests field-based learning that allows for and makes use of simulations and on-the-job experiences, while Hallinger

and Snidvongs (2005:8) support the concept of education leadership learning that takes place in the field, with a focus on the use of real problems that are “closely related to the actual work and functioning of the school”. An interesting suggestion in this regard is that of Donmoyer, Donmoyer and Galloway (2012:11) - these authors suggest adapting the medical fraternity’s “teaching-hospital” concept for use in the field of experiential education leadership learning by identifying schools in which “the principals exhibit exemplary collaborative, distributed and instructional leadership practices” and where the learners are achieving well academically, and then assigning education leadership learning students to such schools to act in a variety of administrative roles in order to “learn about effective leadership experientially” (Donmoyer *et al*, 2012:11).

Such experience-based elements have been included in formal leadership programmes in both the United Kingdom and the United States of America for a number of years (Glatter, 2009:234). These elements include “simulations, project work, field visits and internships”, and although Glatter (2009:234) feels that these experience-based elements can add value to leadership programmes, he warns that they require careful management and monitoring. Crawford and Earley (2011:116), in their discussion of the lessons learned from a pilot study of the National Preparation for Headship Qualification (NPHQ), suggest that administrative internships or what they call “leadership apprenticeships” could be very valuable in the development of future school leaders, and they argue that this should be part of all leadership development programmes. Finally, Rhodes and Brundrett (2009:365) suggest that the creation of opportunities for work shadowing, i.e. where developing school leaders are afforded the opportunity to shadow an experienced and successful school leader, is an important tool in the overall development of school leaders.

Walker and Dimmock (2006:155) summarise the foregoing discussion admirably when they state that “the focus must change from formal leadership development to real-world leadership learning within schools. No formal training programme will, on its own, prepare and develop effective leaders without internal and contextual support from within the school”. The emergence of *real-world learning* (Walker & Dimmock, 2006:155) echoes and is also reflected in the global trend in education leadership learning towards partnerships between and among role players in the field

(universities, representatives of the education profession at both school and professional organisations level) and the subsequent development of school-based projects and school internships as part of education leadership learning (Huber, 2010:230).

As far as the link between the development of a framework for effective education leadership learning programmes based on an appropriate theory or combination of theories of learning, as suggested by Davis *et al* (2005:9), and the selection of appropriate instructional applications or teaching and learning strategies, a review of instructional applications relevant to the various learning theories reveals the existence of a multitude of relevant instructional applications or teaching and learning strategies. While many of these applications or strategies overlap with those presented above (“simulations, project work, field visits and internships” - Glatter, 2009:234, “leadership apprenticeships” - Crawford & Earley, 2011:116, experiential learning - Donmoyer *et al*, 2012:11, group work, learning communities and collaborative learning - Zhang & Brundrett, 2010:155), a number of additional instructional applications or teaching and learning strategies from all four major learning theory paradigms might be considered, for example:

(a) from the behaviourist learning perspective strategies such as behaviour modelling - the provision by the instructor of a model or example of desired behaviour for learners to imitate (Leonard, 2002:14, Schunk, 2012:125) and imitative learning - vicarious learning through the observation of the actions or behaviour of others (Miller and Dollard in Leonard, 2002:90, Schunk, 2012:121).

(b) from the humanistic learning perspective strategies such as holistic learning, a strategy allied to experiential learning in that it takes cognisance of and makes use of the learning context in order to link the new knowledge, skills and attitudes to the learner’s real-life experience and world (Leonard, 2002:85), and mastery learning which prescribes that learners should determine the pace of their own learning and should be provided with feedback to allow the learner to determine the success of his or her learning (Schunk, 2012:102).

(c) from the cognitivist learning perspective a strategy such as goal-based scenarios, which calls for the instructor to provide cases or simulations within the curriculum in which the learner then plays a particular role or performs a set of actions in order to develop new skills (Leonard, 2002:81), and

(d) from the constructivist learning perspective, to the strategies such as groups and group-learning, peer collaboration, modelling and observation (Schunk, 2012:236) already mentioned in the preceding paragraphs could be added for example dynamic assessment – allowing peers to assess and evaluate one another both formatively and summatively (Leonard, 2002:57), active or generative learning – the teaching and use of problem-solving skills, reasoning skills and team work skills in order to connect previous and new knowledge, content and skills (Leonard, 2002:3&79) and de-schooling and personal curriculum design – refocusing learning on the learner by providing learners with curriculum selections and choices that address their own individual learning needs and desires (Leonard, 2002:50&150).

#### 4.3.2.3.3 The context of education leadership learning

“If we should avoid thinking of leadership in simplistic de-contextualised ways, should we not also think of leadership preparation and development as contextualised?” (Lumby *et al*, 2008:3). This statement by Lumby and his co-authors, together with that of Eacott and Asuga (2014:930) who posit that “school leadership preparation and development is both the creator of opportunity and the potential death of the *local (own italics)*” provides the ideal platform for the discussion of context as part of the active learning strategies or modes of delivery of ideal education leadership learning. This discussion of the context of education leadership learning builds on and augments the earlier discussion of the tenants of andragogy that specify that adults have life experience which they bring to the learning situations they enter into (Tight, 1996:104, Knowles, 1984:11) and that adults approach learning from a far more practical perspective, making contextualisation and relevance to their *real-life* essential crucial (Knowles, 1984:12, Tight, 1996:105).

Christie (2010:696) states that school leadership as an activity is context-dependent, because it is “embedded in broader social relationships and cultural understandings”,

and is influenced by issues such as race and gender, location, socio-economic background and the understanding in a given context of what is right and what is wrong. On the issue of the contextualisation of education leadership learning, the global trend that sees providers of education leadership learning programmes increasingly being allowed greater freedom in the actual design of these programmes has meant an “increasing flexibility towards the participants’ needs” (Huber, 2010:229). Eacott and Asuga (2014:930) contend that both academics and practitioners in the field of education leadership learning should consider “the socio-geographic conditions, colonial legacy and the construction of leadership” as they strive to “engage with, and improve, the practice of school leaders”, while Zhang and Brundrett (2010:154) believe that the contextualisation of education leadership learning is one of the two most important factors in education leadership learning, the other factor being the need for school leaders themselves to take responsibility for the development of future leaders within their own school contexts. Brauckmann and Pashiardis (2011:20) state that, because education leadership learning programmes aim to prepare school leaders with the skills and knowledge to “deal successfully with different contextual conditions”, it is important for those who design education leadership learning programmes to take into account contextual factors so as to be able to respond better to the needs of school leaders. This builds on the arguments of both Lauder (2000:25) and Bolam (2003:68) who stressed that education leadership learning is and must be “rooted in” a particular individual and/or school or institutional context. Walker and Dimmock (2006:139) state that education leadership learning programmes should use methodologies - both as the focus of- and as vehicles for education leadership learning (Paterson & West-Burnham, 2006:111) - and content that provides optimal contextual and cultural relevance – for this they suggest the use of action learning together with the inclusion of more formal and theoretical content on policy, change and reform. All these elements must be contextualised and adapted to suit the particular societal and school culture of the participants. They continue to state that both the content and the methodology (or *tools and artefacts*) employed must make use of leadership reality and must also be reflective of school life and school purpose. To do this, programme content and methodology should to a large extent be problem-focused, and should make room for divergent ideas, practices and solutions, which they posit facilitates personal growth among school leaders and the emergence of an awareness of both the uniqueness

of the individual school leader and his/her situation and also of the shared challenges and the multiplicity of the strategies available to overcome those challenges. Successful programmes, they state, make use of multiple modes of delivery which include formal learning opportunities (lectures, seminars) and informal learning situations (for example school visits and shadowing - Walker & Dimmock, 2006:138). Simkins (2012:629) suggests that the contextualisation of education leadership learning should take the form of “personalisation” which may range from for example allowing students to select the order in which they complete activities or study modules of content to allowing students, through strategies such as mentoring, coaching and action learning projects the freedom to “negotiate the kinds of practice activities they engage in or the support they receive” (Simkins, 2012:629). Simkins (2012:630) links this contextualisation of *personalisation* to a constructivist approach to education leadership learning, stating that programmes that make use of such personalisation could lay claim to allowing for the co-construction between the student and the programme providers.

Walker and Quong (2005:97) in their discussion of education leadership learning that moves “beyond best practices”, suggest as an alternative to the concept of best practices the concept of “wise practice”, which they describe as learning that is embedded “within the contexts and cultures which frame schools’ and leaders’ lives” (Walker & Quong, 2005:114). They posit that improving leadership practice in education does not depend on a list of best practices, but rather on a design for education leadership learning that is flexible and adaptable to individuals and situations.

On the issue of education leadership learning in context, Bush *et al* (2007:87) suggest what they call the “polar model of leadership learning”. The following table illustrates this model clearly:

<b>Traditional Education Leadership Learning</b>	<b>21<sup>st</sup> Century Education Leadership Learning</b>
Prescribed	Emergent
Standardised	Personalised
Off-site	Onsite
Classroom-based	Work based
Content led	Process rich
Scale	Depth
Leader development	Leadership development

Table 4.2: The Polar Model of Leadership Learning (Bush *et al*, 2007:87)

In spite of his earlier warning about neglecting theory in the development of education leadership learning programmes (Bush, 2003:228) and in support of his assertion that effective education leadership learning programmes make an explicit link between theory and practice (Bush & Jackson, 2002:424), this model suggests that *leadership* rather than *individual leaders* should be developed, and that the use of an offsite (i.e. not at a school), formal classroom situation and formal theory-rich content approach divorces the developing leader from his or her context and from the human resources (i.e. the members of staff of the school) he or she will depend on to become and to be an effective school leader. In this regard, they also mention “the problem of re-entry” (Bush *et al*, 2007:89), where leaders who have completed education leadership learning programmes experience resistance to the implementation of new ideas and strategies from members of staff who have not shared in the programme. The answer to this problem, they contend, appears to lie in the personalisation and contextualisation of education leadership learning and the use of school-based learning and activities that involve other important role players more, creating within the school an atmosphere more receptive to change and an improved culture of instructional and distributed leadership and collegiality in the performance of leadership functions and activities (Bush *et al*, 2007:90). With this model Bush *et al* (2007:228) further suggest that programmes for education leadership learning should not be slaves to the one-size-fits-all approach, but should rather, as far as is practicable, be developed in conjunction with the participating leaders themselves in order to address their own specific contexts, experience and *wisdom* as well as the specific challenges and strengths of the organisations those

leaders are or will be leading. Such programmes should not be “content led”, but rather should focus on the application of traditional content and theoretical knowledge through methodologies such as problem-based learning or mentoring to the school leadership process and context on-site. However, none of these suggestions should be seen as prescriptive, but should rather be used as “a starting point for thinking about programmes” (Bush *et al*, 2007:228).

In relation to learning theory, this discussion of the need to develop and conduct education leadership learning within context is substantiated by, for example, the Situated Learning Theory, which, as mentioned earlier, focuses on three presuppositions, namely that classroom learning is by nature de-contextualised and irrelevant, that knowledge and skills presented and earned within a contextualised environment such as the work place is more relevant and effective, and that the act of learning is a very sociable and interactive activity that should involve a great deal of mentoring and collaboration (Leonard, 2002:174).

In conclusion of this discussion on the development and provision of education leadership learning in context, it is interesting to note the link here between context as part of the discussion of ideal education leadership learning and what Huber (2010:229) identifies as a trend in the field, namely the fact that because the providers of education leadership learning programmes are increasingly allowed greater freedom in the design and development of such programmes, such programmes are more flexible towards the needs of education leaders and their individual and or country contexts, where a more effective approach to education leadership learning would be to offer the prospective school leader professional development opportunities for and within the context of each individual leaders’ leadership style, experience and personality (Huber, 2010:236).

#### **4.4 Summary**

This chapter brings to a close the review of literature in the field of education leadership learning. It defined the concept of education leadership as the sum of all the purposeful behaviour, acts and / or activity of a school leader focused on and directed towards inspiring and motivating all the role players within the school context

to effectively and efficiently drive and perform the core business of the school, namely teaching and learning, while education leadership *learning* is defined for this study as the broader context of all formal, planned, articulated and relevant learning activities and content that take place in or are presented as part of a formal course of study or programme aimed at the expansion of education leaders' knowledge, capacities and skills in order to increase their effectiveness as education leaders.

This definition of education leadership learning was then linked to the definition of learning, which states that learning is the oldest most fundamental social process (Tight, 1996:21) aimed, through “acquiring and modifying knowledge, skills, strategies, beliefs, attitudes and behaviours” at “an enduring change in behaviour, or in the capacity to behave in a given fashion, which results from practice or other forms of experience” (Schunk, 2012:2).

Within the context of the definitions of both learning and of education leadership learning, the researcher asserted that the designers of an education leadership learning programme should take into consideration (a) what capacities school leaders require to perform their tasks effectively, (b) the manner in which leaders learn and (c) the effectiveness and usefulness of the instructional applications or teaching and learning strategies that it proposes for education leadership learning (Smylie *et al*, 2005:139). Furthermore, a review of the literature revealed that ideal education leadership learning programmes should be underpinned by a sound theory of education leadership (Orr, 2011:120, Earley & Jones, 2010:x, Crawford & Early, 2011:108, Davis *et al*, 2005:8) such as the theory of instructional leadership (Southworth, 2002:77, Huber, 2004:673, Bush *et al*, 2007:400, Brauckmann & Pashiardis, 2011:22) that establishes and promotes curricular coherence (Orr, 2011:120), i.e. a clear link between the aims and objectives of the programme, the learning content and learning activities and the shared values and beliefs encompassed in the underpinning philosophy or theory of leadership (Davis *et al*, 2005:8). Parts of such a programme, such as for example the content component, could be presented in a formal course- and classroom-based milieu (Day & Harrison, 2011:457, Burgoyne & Williams, 2007:10) with students divided into cohorts or year / class groups (Davis *et al*, 2005:9, Lauder, 2000:115, Orr, 2011:120), but these formal learning opportunities (for example lectures and seminars - Walker & Dimmock,

2006:138) should always aim to strike a balance between the theoretical and the practical (Brundrett, 2000:365, Crawford & Earley, 2011:108), with both the content or theoretical part and the practical part being based on recent education leadership and education leadership learning research (Orr, 2011:120). The learning strategies or modes of delivery for such an ideal education leadership learning programme must be designed within the framework of adult learning theory (Davis *et al*, 2005:9) and should consider the context of both leaders and leadership (Walker & Quong, 2005:97, Paterson & West-Burnham, 2006:111, Lumby *et al*, 2008:3, Brauckmann & Pashiardis, 2011:20) and should promote both active and experiential learning (Davis *et al*, 2005:8, Zhang & Brundrett, 2010:155, Orr, 2011:120) through strategies such as mentoring (Bush & Jackson, 2002:427, Davis *et al*, 2005:9, Paterson & West-Burnham, 2006:111), coaching (Bush & Jackson, 2002:426, Day & Harrison, 2011:459), networking (Bush *et al*, 2007:87, Earley & Weindling, 2007:4, Day & Harrison, 2011:459), job shadowing (Mathibe, 2007:523, Bush, 2012:10) and quality leadership internships (Crawford & Earley, 2011:116, Orr, 2011:120). In addition, both the foundations of education leadership learning and the features of ideal education leadership learning were discussed in relation to both the elements of the education leadership learning activity system (Engeström, 1987:78) and to various learning theories, but in particular to the theory of andragogy which, with its focus on specifically how adults learn, was deemed to be most appropriate to the education leadership learning activity system that served as the site for this particular study.

Chapter 5 will present the research design and methodology used for the study being reported on in this thesis.

## CHAPTER 5

### Research Approach and Methodology of the Study

#### 5.1 Introduction

The purpose of this chapter is to describe the *research processes* of this study into the experiences and perceptions of master's students of their own education leadership learning while enrolled in a master's degree programme in educational leadership offered by a South African university. In short, this chapter details the how, who and where of the study, and it includes details of the research paradigm and approach selected for the study as well as of the research methodology, including the research design, the methods of data collection and the rationale and processes for selecting the participants and the sites where the research was conducted. The final section of this chapter describes the measures employed to ensure the trustworthiness and credibility of the results, and also the ethical issues surrounding the study and the measures taken to ensure the safety of the participants.

#### 5.2 Research Paradigm and Approach

Cohen *et al* (2011:5) define a research paradigm as “a way of pursuing knowledge” and a system of beliefs or a set of principles that leads firstly to an agreement on what phenomena or problems are worth researching, and secondly to an agreement on how these problems or phenomena could best be investigated. However, in order to properly understand and explain the concept of a research paradigm both as a concept and as it relates to this study, one needs to understand what Cohen *et al* (2011:5) and others (Bryman, 2012: 30) describe as the two competing views or perspectives of research in the social sciences, which includes the field of education research. The first of these two views, they contend, is the positivist or “established, traditional” view that posits that research in the social sciences is “essentially the same as the natural sciences”, in other words that education research is “concerned with discovering the natural and universal laws regulating and determining individual and social behaviour”, while the second view – the interpretive one – which, although sharing with the natural sciences a concern for the scientific rigour of research, “emphasises how people differ from inanimate natural phenomena, and indeed, from

each other” (Cohen *et al*, 2011:5). These two different views of research in the social sciences, and therefore the views appropriate to this study, can best be explained, they state, by investigating the epistemological and ontological assumptions or positions on which these views are founded (Cohen *et al*, 2011:5). The paragraphs that follow identify and describe the paradigm selected for the study at the hand of the researcher’s epistemological and ontological positions.

### **5.2.1 Epistemological Position of the Study**

As mentioned briefly in Chapter 3, epistemology is defined as “the nature of knowledge – its nature and forms, how it can be acquired and how (it can be) communicated to other human beings” (Cohen *et al*, 2011:6). The epistemological position of this study, that is, its understanding of the nature of knowledge and how it can be acquired, is an interpretivist one. This paradigm, unlike the positivist paradigm with its links to the natural sciences and its emphasis on the *explanation* of human activity and behaviour, focuses explicitly on the *understanding* of man’s activity and behaviour, or, as Cohen *et al* (2011:17) put it, the central focus of the interpretivist paradigm is to “understand the subjective world of human experience”. In this regard, the researcher, while investigating the experiences and perceptions of master’s students of their own education leadership learning, was concerned with understanding their experiences and perceptions of this phenomenon as part of each individual participant’s “world of human experience” (Cohen *et al*, 2011:17).

### **5.2.2 Ontological Position of the Study**

Whereas the epistemological position of a study indicates the understanding of the nature of knowledge and how it can be acquired, the ontology of a study describes the researcher’s position on what constitutes reality. This is clear from the description by Cohen *et al* (2011:5) and others (Nieuwenhuis, 2007:81) of ontological assumptions or positions as “assumptions which concern the very nature or essence of the social phenomena being investigated”. Essentially, the ontological position of a study indicates what the researcher believes about the nature of social reality, with the choice of ontological position resting on the researcher’s answer to the question of whether he or she considers social reality as objective, in other words that there is “a reality external to social actors” (Bryman, 2012:32) or as “the result of individual

consciousness” (Cohen *et al*, 2011:6), with reality, as Bryman posits, being a series of “social constructions built up from the perceptions and actions of social actors” (2012:32). Bryman (2012:33) refers to these two positions as objectivism and constructivism respectively.

Based on the preceding explanation, the ontological position of this study is a constructivist one, in that the researcher views reality as constructed rather than objective. Bryman (2012:32) defines constructivism as “an ontological position that asserts that social phenomena and their meanings are continually being accomplished by social actors”. It is the researcher’s belief not only that students of a master’s degree programme in education leadership actively construct knowledge of education leadership for themselves during their participation in education leadership learning activities, but also that they, through their experiences as participants in the programme and through their perceptions of the various aspects or elements of the programme, construct for themselves a reality not only of themselves as education leaders, but also of education leadership learning.

### **5.2.3 Research Paradigm**

In the light of the preceding discussion on the epistemological and ontological positions of the researcher, it is true to state that this study was conducted from within the interpretivist-constructivist paradigm (McMillan & Schumacher, 2014:14) – the interpretivist part of the paradigm stemming for the fact that the study focuses on the understanding and interpreting rather than the explanation of the human activity of education leadership learning (Cohen *et al*, 2011:17, Bryman, 2012:28), and the constructivist part of the paradigm finding its substance in the fact that the researcher believes that reality is constructed rather than objective (Bryman, 2012:33), and that education leadership learning students construct that reality for themselves.

### **5.2.4 Research Approach**

The epistemological and ontological positions of the researcher set out in the preceding paragraphs prescribe, according to McMillan and Schumacher (2014:8), a qualitative approach to the study of the experiences and perceptions of master’s students of their own education leadership learning. While Kvale states that it is no

longer possible to define qualitative research simply as “not quantitative research” (2011:x), and suggests that qualitative research has developed a multi-faceted identity of its own, McMillan and Schumacher (2014:5) define qualitative research as “research that refers to an in-depth study using face-to-face or observation techniques to collect data from people in their natural settings”. Creswell (2014:11, 263) describes qualitative research as a useful interpretivist approach for understanding and describing various human activities within a variety of contexts by collecting the detailed views, descriptions and perceptions of participants “in the form of words or images” for analysis and the identification and description of the particular themes that emerge or the particular characteristics of a phenomena within a specific context. This echoes to a large extent the explanation of Gay *et al* (2014:12) who posit that qualitative research “seeks to probe deeply...to obtain in-depth understandings about the ways things are, why they are that way and how the participants in the context perceive them”.

In addition to the above, both Cohen *et al* (2011:219) and Nieuwenhuis (2007:75) posit that qualitative research provides participants with a voice – a chance to speak - to formulate and put into words their own understanding of their world and the phenomena, behaviour, actions and intentions they come across and how they experience and perceive these, or, as Kvale (2011:x) puts it, qualitative research allows the researcher “to unpick how people construct the world around them”.

In summary, a qualitative research approach entails the in-depth investigation and description of either human activities or a specific phenomenon, both within a particular context, using personal face-to-face methods of data collection in order to give the people involved in or with such activities or phenomena within that particular context a voice and the opportunity to provide detailed views and descriptions of their experiences and perceptions, and, in so doing, allowing them to formulate and express their own understanding of these activities, phenomena and contexts as part of their own life world. Because this study sought to understand how master’s students construct and make sense - through their experiences and perceptions - of their own education leadership learning within the context of their participation as students of a master’s degree programme in educational leadership, the qualitative research approach with its in-depth nature and personal or face-to-face methods for

data collection and its provision for the voices of participants, was deemed the most appropriate approach to employ.

## 5.3 Research Methodology

### 5.3.1 Research Design

A research design is a plan or strategy that describes “the conditions and procedures for collecting and analysing data” (McMillan & Schumacher, 2014:6) or “the procedure for conducting the study, including when, from whom and under what conditions the data will be obtained...the general plan” for the study (McMillan & Schumacher, 2014:29). The research design allows for the development - from the epistemological and ontological positions or assumptions described in the preceding paragraphs – of the plan for every aspect of the research, including how participants will be selected, how data will be collected and finally how the data analysis will be done (Nieuwenhuis, 2007:70). The research design or strategy selected for this qualitative study is the case study design.

#### 5.3.1.1 The Case Study Design

McMillan and Schumacher (2014:32) define a case study as a qualitative research design that allows for the examination – in great detail - of a “bounded system”, using sources of data found within the system or case. This definition is echoed by both Creswell (2014:1) and Bryman (2012:66); the latter stating that a case study involves “the detailed and intensive analysis of a single case”. Cohen *et al* (2011:289) define a case study as “a specific instance that is frequently designed to illustrate a more general principle” and as “the study of an instance in action”. Although sometimes viewed as a “single instance” of a “bounded system, for example a child, a clique, a class, a school (or a) community” (Cohen *et al*: 2011:290), this need not necessarily hold true for all case studies, as the distinction between a specific phenomenon and the context within which it takes place or can be found is often not that clear (Cohen *et al*: 2011).

Finally, Cohen *et al* (2011:183) suggest that case studies “frequently follow the interpretivist tradition of research – seeing the situation through the eyes of the

participants”, an opinion supported by Gay *et al* (2014:13) and also Nieuwenhuis (2007:75) who states that case studies typically aim at providing the interpretivist researcher with a comprehensive understanding of how participants in a specific context or situation construct meaning of the phenomenon under investigation.

In summary, a case study can be defined as the selection as a case of a group, community, organisation, system, population, instance or phenomenon and its surrounding and relevant context for detailed and intensive investigation and analysis, most frequently from an interpretivist perspective. Case studies use sources of data situated within the case itself in order to accurately describe and / or provide a comprehensive understanding of that case and, in doing so, possibly creating an opportunity to illustrate and describe a more general principle or phenomenon.

### **5.3.1.2 Type of Case Study**

It is important at this juncture in the discussion of the nature and characteristics of a case study to note that a number of different types of case study can be discerned (Cohen *et al*, 2011:290 – 291). The type of case study deemed most appropriate for this study is the instrumental case study, which is used primarily to study and describe a specific theme or phenomenon within its natural context (McMillan & Schumacher, 2014:371). When viewed in the context of a case study as the study of a “bounded system” or “community” (Cohen *et al*, 2011:290) then the instrumental case study – where a specific context is used to investigate and highlight a theme or phenomenon that presents itself in that context, seems most appropriate for this study. To be specific, the community or bounded system of a master’s degree programme in educational leadership offered by a South African university provided the context or activity system (Engeström, 1987:78) within which the researcher could investigate the phenomenon of education leadership learning, specifically master’s students in that programme’s experiences and perceptions of their own education leadership learning.

The case study design, and specifically the instrumental case study design, was deemed appropriate for this study because of its ability to investigate, comprehensively describe and understand a phenomenon and the particular context

within which it is found. The case at the focal point of this study is the phenomenon of education leadership learning, and the experiences and perceptions of master's students - within the specific context of the selected master's degree programme in educational leadership offered by a South African university - primarily of their own education leadership learning, but also of the contribution this learning has, in their experience and perception, made to their leadership practice.

### **5.3.2 Research Methods**

The term *research methods* refers collectively to all the actions taken in preparation for, and as part of, the data collection and analysis process, including selecting a sampling strategy and applying it to the overall population in order to single out the participants for the study, planning for and collecting the data and finally, preparing the data for analysis and the actual process of data analysis.

#### **5.3.2.1 Sampling**

Researchers in the social sciences cannot always include in their data collection every possible participant in the category, class or population being researched. This means that such researchers must often rely on gathering data from only a portion or sample of that category, class or population with the expectation that what is found in that smaller, selected sample of the population applies to the whole population (Cohen *et al*, 2011:143). Sometimes factors related to the researchers themselves or to the population or even to the phenomenon being studied, suggests the inclusion or exclusion of certain potential participants - the process of considering all these factors and then selecting a smaller, representative sample of the population is referred to as sampling (Gay *et al*, 2014:134).

Although the total number of students who had participated in the selected master's degree programme in educational leadership since its inception is not excessive, certain factors related to the researcher and to the possible participants necessitated careful consideration during the process of participant selection, and therefore had an influence on the sampling process of this study. These factors are detailed in the paragraphs that follow.

### 5.3.2.2 Types of Sampling

There are two main sampling methods employed by researchers to determine the sample for any research project – probability sampling and non-probability sampling (Cohen *et al*, 2011:153 – 155, Gay *et al*, 2014:135, McMillan & Schumacher, 2014:153). This first main sampling method – probability sampling – is also known as random sampling, and is usually reserved for the selection of respondents in quantitative research studies. In this method of sampling, every member of a population under investigation has an equal chance of being selected to participate in a study, with the final selection being random, or “a matter of chance” (Cohen *et al*, 2011:153, Gay *et al*, 2014:135).

The second main sampling method – non-probability sampling - is most often the sampling method of choice for qualitative researchers. This method makes provision for the purposive inclusion of some and exclusion of other members of the population under investigation (Cohen *et al*, 2011:153, Gay *et al*, 2014:144). Because this sampling method is more suited to qualitative studies, this is the sampling method adopted for the study being reported on here.

Within the sphere of the non-probability sampling method, a number of separate sampling strategies can also be identified. Included under the umbrella of this sampling method are strategies such as (a) snowball sampling - where a small number of initial participants are identified and they then assist with the identification of other suitable participants - (Cohen *et al*, 2011:158), (b) quota sampling - where the sample is selected in such a manner that factors such as age or gender in the overall population receive proportional representation in the final sample - (Maree & Pietersen, 2007:177) and (c) purposive sampling – where the researcher deliberately selects specific participants from within the wider population that will serve a specific purpose (Cohen *et al*, 2011:156, Gay *et al*, 2014:145).

### 5.3.2.3 Choosing a Sampling Strategy for this Study

For the purposes of this study, the researcher had two selections to make - in the first place he had to select an appropriate education leadership learning activity system within which to conduct the study, and in the second place he had to select

participants for the study from within the population of students of that education leadership learning activity system. In order to make the first selection, namely an appropriate education leadership learning activity system, the researcher heeded the suggestion of Bush and Jackson (2002:424) who, as discussed in Chapter 3, argue that principals and other aspiring education leaders should gain their qualifications at masters' degree level because teaching is a graduate level profession in most developed countries, and that subsequent learning, including education leadership learning, should be undertaken at a postgraduate level. The selection of the actual master's degree programme as education leadership learning activity system was done both purposively and for convenience (Cohen *et al*, 2011:156, Gay *et al*, 2014:145), because (a) the programme selected focuses on educational leadership at a master's degree level and can therefore reasonably be assumed to involve education leadership learning, which is the phenomenon under investigation in this study, and (b) because the researcher is an employee of the University at which the selected programme is offered, making access to both the institution and the participants convenient.

The selection of the actual participants from within the ranks of students who were or had been enrolled for the selected master's degree programme in educational leadership was also done purposively (Cohen *et al*, 2011:156, Gay *et al*, 2014:145) because, as students or former students of the programme "they will be representative or informative about the topic of interest" (McMillan & Schumacher, 2014:152), in this case the experiences and perceptions of master's students of their own education leadership learning.

#### **5.3.2.4 Selecting the Actual Participants**

Using the definition of purposive sampling provided above, and given the fact that this study sought to understand and describe the experiences and perceptions of master's students of their own education leadership learning, then the possible participants most likely to be in possession of the information required to answer research questions focused on education leadership learning would be students registered for a master's degree focusing on education leadership. The selection of the actual participants from within the total population of past and present students of the selected master's degree programme in educational leadership was directed by

two factors within the researcher's own context, the first being the fact that he himself is a former student of the selected programme, and the second being the fact that he is an employee of the university at which the programme is offered and as such has in the past been involved in the teaching of a module in that programme.

Because the researcher himself was a member of the programme's class of 2007, and because, as an employee, he presented one of the modules in the programme to the classes of 2011, 2012, 2013 and 2014, he decided to restrict the sample for this study to students who had registered to commence their studies in 2008, 2009 and 2010. This decision was made in order to (a) exclude students enrolled in 2006 and before (the programme started in 2004) on the grounds that too long a period of time had passed since their participation, and (b) prevent a situation where the students from the classes of 2007, 2011, 2012, 2013 and 2014 produced data with lower levels of credibility and trustworthiness due to what McMillan and Schumacher (2014:126) call "subject effects" - possible changes in the behaviour and responses of participants as a result of a reaction to one or more elements, for example the researcher. In the context of this study, the researcher considered the high risk that the students of those classes may display subject effects as a result of their familiarity with the researcher, either as a fellow student or as a lecturer, because, especially in the case of the latter four classes, these potential participants would be called upon to relate their experiences and perceptions of their leadership learning in *inter alia* a module presented by the researcher. For this reason, he decided to exclude these classes from the sample.

While Maree and Pietersen (2007:178) state that there is no definitive answer to the question of how large a sample is required for any given research study, Cohen *et al* (2011:144) posit that the nature and purpose of the study and the size of the overall population are primary factors that should influence the qualitative researcher's choice of sample size.

Considering the qualitative nature of this study and its purpose of investigating the experiences and perceptions of master's students of their own education leadership learning, and also the overall size of the available population (classes of 2008, 2009 and 2010) of twenty-seven (27) possible participants (see table 5.1 below), the

researcher decided to conduct interviews with no fewer than twelve (12) and no more than twenty (20) participants. In addition to the influence of the nature and purpose of the study and the size of the overall population already mentioned (Cohen *et al*, 2011:144), the researcher based this decision as to the minimum and maximum number of participants on the advice of Maree and Pietersen (2007:178) who suggest that (a) the smaller the identified overall population, the greater the percentage of that population that must be included in the study as participants in order to improve the credibility and trustworthiness of the results, and (b) the practicalities of time- and budgetary limitation should also be taken into consideration once the other important factors have been considered.

<b>Class</b>	<b>Number of Male Students</b>	<b>Number of Female Students</b>	<b>Total</b>
2008	10	3	13
2009	6	1	7
2010	5	2	7
<b>Total</b>	<b>21</b>	<b>6</b>	<b>27</b>

Table 5.1 – Possible Participants by Gender and Class

After telephonic contact had been attempted with all twenty-seven (27) of the students of the programme's classes of 2008, 2009 and 2010, three (3) students declined the invitation to participate, five (5) students, after initially showing interest in participating, failed to respond to both the invitation to participate / letter of consent (annexure A) forwarded to them by e-mail and to any further attempts at contact, one (1) student was deemed to live too far away from the researcher's location (more than 700km) to make her participation time-and cost effective, three (3) students were found to be untraceable through the contact details available on their academic records, and fifteen (15) students declared themselves willing to participate voluntarily in the study - see table 5.2.

<b>Class</b>	<b>Number of Male Students</b>	<b>Number of Female Students</b>	<b>Total</b>
2008	5	0	5
2009	3	2	5
2010	3	2	5
<b>Total</b>	<b>11</b>	<b>4</b>	<b>15</b>

Table 5.2 – Actual Participants by Gender and Class

In summary, this study employed a non-probability sampling method (Gay *et al*, 2014:135) called purposive sampling (Cohen *et al*, 2011:156, Gay *et al*, 2014:145) to select participants from a master's degree programme in educational leadership's classes of 2008, 2009 and 2010 in order to investigate the experiences and perceptions of these master's students of their own education leadership learning, because these participants, as students of an educational leadership programme, could reasonably be expected to be well-informed and informative on the topic of education leadership learning (McMillan & Schumacher, 2014:152). The size of the sample was determined by the nature and purpose of the study and the overall size of the available population (Cohen *et al*, 2011:144, Maree & Pietersen, 2007:177) and also by time and cost considerations (Maree & Pietersen, 2007:178). Ultimately, fifteen (15) of the overall population of twenty-seven (27) students of the identified classes of the programme consented to be interviewed for the study.

### 5.3.3 Data Collection

Kvale (2011:1) suggests that "if you want to know how people understand their world and their lives, why not talk to them?" Taking his advice, the researcher selected interviews as the most appropriate means of collecting the data required to answer the primary and secondary research questions.

#### 5.3.3.1 Data Collection Method - Interviews

Kvale (2011:5) states that conversations are one of the oldest ways of producing knowledge – indeed; he counts Socrates' dialogues with his opponents as some of

the earliest examples of interviews to generate knowledge. Gay *et al* (2014:338) define an interview as “a purposeful interaction in which one person obtains information from another”, while Creswell (2014:238) states that an interview takes place “when researchers ask one or more participants open-ended questions and record their answers”. Nieuwenhuis (2007:87) posits that the purpose of a qualitative interview is to obtain “rich descriptive data” on the point of view or perspective of the participant and his or her “ideas, beliefs, views, opinions and behaviours”, with McMillan and Schumacher (2014:381) highlighting the fact that interviews can be very successfully used to collect data on how individuals make meaning of- and conceive their world and “make sense of the important events of their lives”. It is with these unique characteristics of interviews in mind – this ability to collect “rich descriptive data” (Nieuwenhuis, 2007:87) on the meaning and sense that participants make of the significant events in their lives (McMillan & Schumacher, 2014:381) - that the researcher selected interviews as the most suitable method for investigating master’s students’ experiences and perceptions of their own leadership learning. From the large number of different types of interviews described in research literature, the researcher selected individual semi-structured interviews as the most “fit for purpose” (Cohen *et al*, 2011:412) in terms of the primary and secondary research questions posed in Chapter 1.

### **5.3.3.2 Semi-Structured Interviews**

Bryman (2012:470) states that a semi-structured interview usually consists of a series of questions that, although presented in the general form of an interview protocol, may be asked and answered in any sequence, and may be augmented by additional probing or exploratory questions in order to collect comprehensive data. The questions for a semi-structured interview are also usually somewhat more general in their frames of reference than those used in, for example, a structured interview. Both Bryman (2012:470) and Nieuwenhuis (2007:87) suggest that semi-structured interviews allow the researcher more latitude to pose clarifying and/or probing questions, which in turn makes for greater detail in participants’ responses and consequently for greater depth and richness of data. Finally, Gay *et al* (2014:338) suggest that semi-structured interviews are ideal for gathering data on the

experiences of participants, another trait of this type of interview that makes it ideal for the study reported on here.

A semi-structured interview can thus be described as a form of verbal communication between two persons, one being the interviewer and the other the interviewee, said conversation aimed at gathering rich, comprehensive information about a specific issue or phenomenon. This type of interview is most often guided but not rigidly prescribed by a protocol of topics and questions focusing on that specific issue or phenomenon. The interviewer may, as the conversation unfolds, prompt the interviewee or probe more deeply into a matter by using appropriate supplementary questions and prompts.

For this study, the researcher developed an interview protocol (Creswell, 2014: 247) of questions aligned with selected elements of the theoretical framework and focused on the issue of education leadership learning as it presented itself to the participants during their enrolment for a master's degree programme in educational leadership.

### **5.3.3.3 The Interview Protocol**

The questions in the interview protocol (Creswell, 2014:247) for the individual semi-structured interviews conducted for this study were developed within the framework of selected elements of Engeström's Activity Theory (1987:78) and these questions also included topics that emerged during the review of the literature on education leadership learning, as reported on in Chapters 3 and 4. The elements of Engeström's Activity Theory (1987:78) that formed the structure of the interview protocol are tools and artefacts, community, rule and the division of labour, and questions elucidating these elements were developed in order to contribute to the answering of the primary and secondary research questions presented in Chapter 1, the primary question being:

What are the experiences and perceptions of master's students enrolled in a master's degree programme in educational leadership of their own education leadership learning?

and the secondary questions being:

Which aspects of the master's degree programme in educational leadership do master's students perceive as having made the greatest contribution to their own education leadership learning?

Which aspects of the master's degree programme in educational leadership do master's students perceive as barriers or challenges to their own education leadership learning?

What are the master's students' experiences and perceptions of the contribution of their own education leadership learning to their leadership practice?

The following extracts from the interview protocol are presented as a practical illustration of the alignment between the interview questions, the research questions and the selected elements of the theoretical framework.

#### 5.3.3.3.1 Tools and artefacts

Under the element tools and artefacts, the interview protocol included questions on the content and structure of the six (6) course work modules that make up the master's degree programme in educational leadership, as well as on the study material such as the readers and study guides provided for these modules. Examples of the questions posed are 'What was your experience, in general terms, of the learning about education leadership that you experienced during the 6 modules you were required to complete as part of the educational leadership programme?' and 'What was your experience of your own education leadership learning facilitated by the content of the individual modules?'. For this particular question, participants were then prompted with the names and codes of the modules and encouraged to describe their education leadership learning experiences in each individual module. These example questions and the others included in the section on tools and artefacts were developed to contribute to the answering of the primary research question, in that they seek to understand the master's students' experiences and

perceptions of the course work section of the programme as part of their overall education leadership learning experience.

Another aspect of education leadership learning investigated in the tools and artefacts section of the interview protocol was the master's students' experiences and perceptions of (a) the modes of delivery of the education leadership learning content and (b) the use of information and communication technologies (ICT) during the programme, and how these aspects influenced their perceptions of their own education leadership learning. Questions such as 'What was your experience of the mode of delivery of these core modules?', 'How, if at all, do you think the mode of delivery of these modules contributed to your education leadership learning?' and 'Do you think the modes of delivery or the teaching strategies used were appropriate for adult learners?', spoke directly to their perception of the manner in which the education leadership learning content was carried over to them, while the students' experience and perceptions of the use of ICTs a part of their education leadership learning was probed with questions such as 'What do you think the contribution of information and communication technology (ICT) was to your experience of education leadership learning?'

The tools and artefacts section of the interview protocol also investigated, as part of their experiences and perceptions of their own education leadership learning, the master's students' perceptions of the contribution of the tools and artefacts to their education leadership practice with questions such as 'In terms of your education leadership learning during these modules, which of them, if any, did you find most applicable to your role as an education leader, and why would you say this particular module or modules is applicable to your role as an education leader?' and 'What do you perceive the contribution of the education leadership learning that you experienced in the module you just mentioned to be on your practice as an education leader?'. These questions were developed to contribute to the answering of the third of the secondary research questions, in that they seek to understand and describe the master's students' perceptions of the contribution of their education leadership learning to their individual education leadership practice.

### 5.3.3.3.2 Rules

The final element of the activity system selected for attention in this study is entitled rules. In the context of this study, the rules of the activity system called the master's degree programme in educational leadership include all the rules, practices, culture and traditions of the programme. As mentioned in Chapter 2, these included the rules, practices, culture and traditions concerning, for example, contact session attendance, assessment submission, and communication between students and with lectures. Questions focusing on this element included the following: 'Every programme or course of study functions within or by certain rules and regulations - as a practical indication of the contribution of these rules and regulations to your education leadership learning experience, what were the rules or regulations regarding the following matters, and how did you experience these rules during your participation in the programme - contact session attendance, communication with the lecturers or fellow students?' and 'In your opinion, how did these rules and regulations impact your participation in this programme?'. The participants' experiences and perceptions of the culture and traditions of the programme in relation to their own education leadership learning was probed with the questions 'Which traditions or elements of a specific master's in educational leadership culture (*how we do things here*) are you able to identify?', and 'How, if at all, did these traditions and/or culture contribute to your own education leadership learning?'.

These questions related to the rules as element of the activity system sought to contribute to the answering of both the primary and secondary research questions by investigating both the interaction and relationship between the rules and the other elements of the activity system, and by providing an opportunity for the master's students to reflect on their experiences and perceptions of the contribution of these rules and of the culture and traditions of the programme to their education leadership learning as well as on their experience and perception of aspects of the programme that both contributed to and/or acted as barriers to their own education leadership learning.

### 5.3.3.3.3 Community and the division of labour

These two elements of Engeström's Activity Theory (1987:78) describe and include all the participants in the activity system and their different roles and functions within

the activity system. For the selected master's degree programme in educational leadership, this includes the roles played by, for example, the individual students, by study groups constituted for various modules or tasks, and also those roles played by the University staff, including the lecturers, study supervisors and administrative staff. The questions related to this element of the theoretical framework include 'How did you experience your interaction with the other students of your cohort in terms of the value this interaction added to your education leadership learning?' and 'In your opinion, what specific role or roles did the following person or persons play in your education leadership learning during your participation in the programme - administrative staff, fellow students, lecturers, study groups, supervisors?'

As was the case with the questions related to the tools and artefacts element of the activity system, the questions related to the division of labour were aimed at describing and understanding (a) the interaction and relationship between the different role players in the activity system and the experiences and perceptions of the master's students of their own education leadership learning, and (b) the interaction and relationship between the role players and other elements of the activity system.

The complete protocol of questions discussed during the interview is attached to this thesis as annexure B.

### **5.3.4 Data Analysis**

Cohen *et al* (2011:537) define data analysis as the process of "organising, accounting for and explaining the data" with McMillan and Schumacher (2014:395) adding that this process "is primarily an inductive process" that involves sorting the data into categories so that themes, patterns, trends that emerge and the relationships between categories can be identified and studied. Even though there is no one perfect or correct way of analysing qualitative data (Cohen *et al*, 2011:537, McMillan & Schumacher, 2014:395), the integrity of the process of data analysis selected for a given study is vital and must be seen to ensure and protect the credibility and trustworthiness of the study (Nieuwenhuis, 2007:113, Creswell, 2014: 221). Cohen *et al* (2011:537) posit that the process and procedures selected by the researcher should be "fit for purpose", in other words it must suit the nature, purpose

and design of the study in question. The sections that follow detail the data analysis process and procedures deemed most *fit for purpose* for this study, and are based on what both Nieuwenhuis (2007:103-113) and Creswell (2014:261) suggest is a sound framework for a trustworthy and credible process of data analysis, namely (a) data preparation and organising, (b) data coding, (c) establishing categories and themes and re-organising or re-structuring the data, (d) analysing and interpreting the data and (e) presenting the data and findings.

At this juncture, and as part of the mantra “fit for purpose” (Cohen *et al*, 2011:537), it is important to highlight and explain a very important choice made by the researcher with regard to the use of technology in the process and procedures of data analysis for this study. Creswell (2014:263) posits that despite the popularity of the various computer software programmes available for use in data analysis, researchers still “have a choice about whether to hand analyse data or to use a computer” to do so. According to Creswell (2014:265), hand analysis is suitable when (a) the data set is small (fewer than 500 pages of transcribed data) and (b) the researcher has been personally involved in the data collection process and wants to remain close to the data and maintain a *hands-on* feel for the study. Having been closely involved with the participants and having done all the data collection, processing and preparation himself, and having, after transcription and preparation, a data set of approximately 320 pages of data, the researcher opted to hand analyse the data for this study.

An additional factor that prescribed the researcher’s choice of hand- over computer analysis is the fact that, in order to remain true to the language of the original interviews and to preserve the richness, nuance, flavour and idiosyncrasies of each individual interview (Cohen *et al*, 2011:536, Nieuwenhuis, 2007:104), all the interviews, including five (5) interviews conducted in the Afrikaans language, were coded in the language in which they were conducted. This contributed to the researcher’s decision to hand analyse the data in the sense that none of the data analysis software programmes (for example Atlas Ti) make provision for the analysis of data in Afrikaans.

However, it must be noted that, although the data for this study was hand analysed, all the preparation and organisation of the data (transcriptions, coding, re-organisation into categories and themes) was done by computer.

#### **5.3.4.1 Preparing and Organising the Data**

The first step in the data analysis process is data preparation (McMillan & Schumacher, 2014:396, Nieuwenhuis, 2007:103, Creswell, 2014:195), and the first step of data preparation, according to Nieuwenhuis (2007:104) is to provide a detailed description of the sampling process and the actual participants - a full and detailed description of the master's students who participated in the study can be found in Chapter 6 of this thesis.

The next step in the data preparation process was to rework the data into a format that was easy to work with and made the data easy to handle, transport and store (McMillan & Schumacher, 2014:398). In order to do this, all the digitally recorded semi-structured interviews were transcribed. Although transcriptions can be time-consuming and, if not done by the interviewer him or herself, can omit details such as mood and context, they also “provide important detail and an accurate verbatim record of the interview” (Cohen *et al*, 2011:537). For this study, the researcher heeded the advice of both Cohen *et al* (2011:536) and Nieuwenhuis (2007:104) who suggest firstly that researchers should transcribe their own data (as opposed to hiring and paying an outsider to do this) in order to capture the true essence and meaning of what was said, and secondly that the transcription should, if possible, remain true to the language of the original interview. For this reason the researcher chose to transcribe and analyse all the interviews in the language in which they were conducted, and not to translate the five (5) interviews conducted in the Afrikaans language into English. However, in instances where the researcher quotes directly from an Afrikaans interview, an English translation for that quote is provided. This choice not to translate the Afrikaans transcripts also prescribed certain other data analysis decisions, as mentioned earlier in this section.

After the data had been prepared for easy processing and analysis, the researcher proceeded to re-organise the data into the pre-determined categories (McMillan &

Schumacher, 2014:397, Cohen *et al*, 2011:551) prescribed by the theoretical framework (Engeström's Activity Theory - Engeström, 1987:78), namely tools and artefacts, rules, community and division of labour. This re-organisation largely involved "cutting and sorting" (Nieuwenhuis, 2007:104, McMillan & Schumacher, 2014:405) the data from each interview into new documents under the headings of each of the selected elements of the theoretical framework mentioned earlier. It must be noted here that although the data was re-organised into the pre-determined categories at this point, further categorisation would take place once the data had been coded.

#### **5.3.4.2 Coding the Data and Establishing Categories and Themes**

Once the data had been prepared by transcription and had been re-organised into the pre-determined categories identified in the theoretical framework, the data was coded in order to create "collection points for significant data" (Nieuwenhuis, 2007:105). This process entailed the careful, line-by-line reading and re-reading of the data to "get a sense of the whole" (Creswell, 2014:268), followed by the assigning of unique codes, which are names allocated to portions of the data to provide meaning (Cohen *et al*, 2011:559) to significant or meaningful parts or segments of the data (McMillan & Schumacher, 2014:398). This process of open coding (Nieuwenhuis, 2007:105, Cohen *et al*, 2011:561) enabled the researcher to create both sub-categories within the pre-determined categories and also to create a number of new categories. A master list of codes was established (Creswell, 2014:269) which was then, after the initial coding phase, re-applied to the data in order to discard redundant codes and to combine similar codes into the pre-determined categories or alternately to inductively identify new categories (Nieuwenhuis, 2007:108).

Finally, with regard to categorising, Cohen and his co-authors (2011:560) warn that researchers should take great care in the identification of categories in order to ensure that these accurately reflect not only the nature of the data being analysed but also the purpose of the research study. With the identification of pre-determined categories during the selection of the theoretical underpinnings of this study - Engeström's Activity Theory (1987:78) - and the inclusion of these in the interview

protocol, as well as the allowance for the emergences of new categories during the coding phase, the final list of categories or themes reflect very accurately, in the opinion of the researcher, not only the theoretical lens through which the human activity of education leadership learning was viewed but also the nature of the data and the purpose of the study as stated in the introductory chapter.

#### **5.3.4.3 Data Analysis and Interpretation**

The selection for this study of a *qualitative* approach from within the *interpretist-constructivist* paradigm suggests the use of content analysis as an appropriate data analysis strategy for this study. Content analysis describes an inductive process of looking at qualitative data sources such as transcribed interviews from different angles in order to understand and interpret the raw data (Nieuwenhuis, 2007:101). The use of inductive reasoning allows for the study of a number of individuals or cases so that generalisations can emerge (Cohen *et al*, 2011:5, Nieuwenhuis, 2007:101), in other words, inductive reasoning allows the researcher “to be open to new ways of understanding” (McMillan & Schumacher, 2014:347). The inductive nature of content analysis, that is, the characteristic of content analysis that allows findings to emerge from the data, makes this data analysis strategy suitable for the qualitative study being reported on here.

Content analysis also allows for the “use of both pre-existing categories and emergent themes in order to generate or test a theory” (Cohen *et al*, 2011:564). As discussed earlier in this chapter, the researcher made use of both pre-determined categories (selected elements of the theoretical framework) and allowed for the emergence of categories during the data coding phase, again indicating content analysis as the most suitable data analysis strategy to employ for this study.

Data interpretation means that “the researcher steps back and forms some larger meaning about the phenomenon” (Creswell, 2014:281) based on, *inter alia*, personal views and experiences and findings from past studies revealed during the review of the literature. The interpretation of the data for this study was done at the hand of the selected elements of Engeström’s Activity Theory (1987:78), namely tools and artefacts, rules, community and the division of labour, and on the basis of findings in

the literature on learning theory (Chapter 3) and past studies, both national and international, on the foundations and features of education leadership learning, current global trends related to this phenomenon and the experiences and perceptions of national and international students of the phenomenon of education leadership learning (Chapter 4).

#### **5.3.4.4 Presenting the Data and Findings**

The researcher deemed the presentation of the findings of the study by (a) research question, (b) then by element of Engeström's Activity Theory (1987:78) and (c) then theme or topic that emerges from the data to be most "fit for purpose" (Cohen *et al*, 2011:537) for this study. Although there is a risk with this method of presentation that sight may be lost of the individual participant and that data may therefore become decontextualized (Cohen *et al*, 2011:551), the researcher believes that what is focal to this study and its purpose is the *themes* that emerge from the data about master's students' experiences and perceptions of their leadership learning and not necessarily each student's individual experiences and perceptions of the phenomena (Cohen *et al*, 2011:552). The advantage of this strategy is that it provides for a logical, ordered and economical approach to handling and presenting the data for a qualitative study such as the one being reported on here. The actual presentation of the data and findings will be dealt with in Chapter 6.

### **5.4 Trustworthiness and Credibility of the Study**

Nieuwenhuis (2007:80), Cohen *et al* (2011:181) and Creswell (2014:283) suggest that the terms *trustworthiness* and *credibility* are more appropriate than *reliability* and *validity* as a means of describing the steps taken to ensure the accuracy or credibility of findings in qualitative research studies. Lincoln and Guba (1985:29) in their seminal work on qualitative research methodology state that "the basic issue in relation to trustworthiness is simple: How can the inquirer persuade his or her audience (including self) that the findings of an inquiry are worth paying attention to, worth taking account of?" This section will address the manner in which the researcher attempted to ensure the trustworthiness and credibility of this study.

### 5.4.1 Member Checking

Creswell (2014:283) suggests three main strategies for ensuring the trustworthiness and credibility of a study, namely triangulation, member checking (or participant review - McMillan & Schumacher, 2014:354) and auditing. This study employed member checking or participant review, crystallisation (Nieuwenhuis, 2007:81) and auditability in an effort to promote and ensure the trustworthiness and credibility of the findings.

Member checking entails verifying the accuracy of data with participants (Bryman, 2012:273). This process can be both formal and informal, and can range from rephrasing and confirming a participant's answer to an interview question during the actual interview (McMillan & Schumacher, 2014:355) to sending each participant a copy of the verbatim transcript of his or her interview for comment and confirmation (Creswell, 2014:283, Cohen *et al*, 2011:185), and can also include returning the final report to one or two participants to establish whether, among other things, the descriptions in the report are complete and accurate, whether the themes emerging from the data are realistic and complete, and whether the interpretations made of the data are reasonable and represent the data collected (Creswell, 2014:283, Nieuwenhuis, 2007:114).

The researcher used both informal and formal means to perform member checks – informally during interviews where he often entered into short *side-bar* type discussions with participants in order to clarify and confirm their answers to certain questions, and formally, by e-mailing each participant an electronic copy of the verbatim transcript of his or her interview for checking and confirmation. Each participant was then called upon to reply to the e-mail confirming the receipt of the transcript and also the accuracy of the content as transcribed by the researcher.

### 5.4.2 Crystallisation

Nieuwenhuis (2007:81) describes the concept of crystallisation as a means of providing the researcher and his audience “with a complex and deeper understanding of a phenomenon” which, he posits, is the aim of most qualitative research studies anyway. Because qualitative research seeks to describe “human

understandings and perceptions of it” (Nieuwenhuis, 2007:81) and not just to measure and assess observable features of things, and because, from a constructivist ontological position, there is no single reality but rather “multiple realities that people have in their mind” (Nieuwenhuis, 2007:81, Cohen *et al*, 2011:5), researchers using a qualitative approach are tasked with describing and analysing *emerging* realities rather than exact and measurable ones. Describing these emerging realities, he contends, requires a shift from seeing things as fixed and two-dimensional and capable of being triangulated to seeing them as crystals, because “crystals grow, change and alter”, making for “an infinite variety of shapes, substances, transmutations, dimensions and angles of approach” (Nieuwenhuis, 2007:81). What the researcher then is required to do is to describe the phenomenon under investigation that crystallises out of the data, with this crystallised reality being creditable because of the fact that those reading the data and analysis should be able to see the same patterns and themes emerging, which adds, he contends, to the trustworthiness of the research (Nieuwenhuis, 2007:81).

Being rooted in the constructivist ontology, this study acknowledges that each participant has and is continuously constructing his or her own individual reality. The data collection method employed (semi-structured interviews) and the data collection instrument developed for this study aimed to give each of the participants the best possible opportunity to describe his or her individual reality with regard to his or her experiences and perceptions of education leadership learning as it presented itself to them as students of a master’s degree programme in educational leadership. By conducting member checks as described above, the researcher sought to add to the trustworthiness of the study by confirming what Nieuwenhuis (2007:81) refers to as the crystallisation of the findings out of the data.

#### **5.4.3 Threats to Trustworthiness - Self-Reporting and Mono-Method Bias**

Because this study employed only one method of data collection (semi-structured interviews) and required participants to answer questions about their experiences and perceptions of *their own* leadership learning, the possibility of both self-reporting bias and mono-method bias (Donaldson & Grant-Vallone, 2002:245) as a threat to the trustworthiness of the study must be investigated.

Self-reporting can be defined as “people’s assessments of and statements about themselves” (Schunk, 2012:16). Self-reporting bias is defined as the tendency among research participants to respond “in a way that makes them look as good as possible” (Donaldson & Grant-Vallone, 2002:247) and is also referred to as social desirability bias (Adams, Soumerai, Lomas & Ross-Degnan, 1999:190). This type of bias is particularly likely in situations where participants are fearful that their responses might find their way back to a figure of authority or someone who may cause them harm in some way (Donaldson & Grant-Vallone, 2002:247). In order to minimise this type of bias, the researcher is obliged to be selective in the instances in which he or she uses self-reporting, specifically with regard to “the specific questions being asked and the types of research questions one wants to answer” (Donaldson & Grant-Vallone, 2002:247). With regard to the type of research questions, the use of self-reporting data collection methods, either in questionnaire or interview formats, is best avoided where a study seeks to answer questions regarding either the work performance or the health of a population. Similarly, specific interview questions or questionnaire items requiring participants/ respondents to report on their own work performance or on their own mental and physical health should also be avoided in order to minimise and control self-reporting bias (Donaldson & Grant-Vallone, 2002:249).

In the context of this study, the research question seeks to understand the experiences and perceptions of master’s students of their own education leadership learning, and as such is not directed towards their *performance*, either as students of a master’s degree programme in educational leadership or as education leaders. With regard to the interview questions, a review of the semi-structured interview schedule (annexure B) reveals that of the two questions which might be construed as asking participants to discuss some aspect of their own performance (question 15 – ‘As a practical measure of your experience of the education leadership learning presented during the course work section of the programme, how much time did you spend on preparation for lectures, assignments and essays, examinations?’ and question 18 – ‘Do you feel the marks you attained accurately reflected a) the amount of time and effort you put in, b) the degree to which you achieved the outcomes set at the beginning of each module and the course overall?’), neither of them pose any risk for participants in terms of their performance, should their individual answers be

revealed to some figure of authority. This is because their performance as indicated by their answers has or would have no bearing on their actual academic performance, because the amount of time spent on preparation for exams and other forms of assessment does not form part of any of the formal assessment criteria or outcomes for any of the modules.

With regard to mono-method studies - studies that employ only one source of data, for example using only questionnaires or only conducting interviews - Donaldson and Grant-Vallone (2002:248) posit that three factors determine the extent to which the use of only one research method will affect the trustworthiness of the results – these are:

(a) the nature of the phenomenon or topic being studied, and the degree of sensitivity attached to the topic being investigated. The researcher needs to ask him- or herself whether there is any logical second and/or third data collection strategy or method that could be employed in order to facilitate triangulation (confirming data from more than one individual or data collection method – Creswell, 2014:14).

(b) the disposition of the participants - the researcher has to ask him- or herself how likely the participants are, given the topic being investigated and the data collection instrument being used, to give or to feel obliged or forced to give socially desirable answers in order to “look as good as possible” (Donaldson & Grant-Vallone, 2002:247)

(c) the situational characteristics of the study - the researcher needs to ask him- or herself how much pressure there is within the context of the study to give socially desirable answers.

To these three factors Ribbins (2008:62) adds context – he posits that the use of a single or mono-method approach to the study of education leadership learning is often the only manner in which to conduct studies into this phenomenon, and states that its use must however be justified by the context of such a study.

The phenomenon at the heart of this study – education leadership learning – cannot be considered a particularly sensitive one, and because participants were not required to answer questions related to their own performance, either as students or as education leaders, the risk of the use of only one data collection method and the bias of self-reporting is, in the opinion of this researcher, controlled and reduced to an acceptable level.

With regard to the disposition of the participants in this study and the situational characteristics of the study and the extent to which these factors, given the topic being investigated and the data collection instrument being used, would cause the participants to feel “obliged or forced” to give answers that will make them “look as good as possible” (Donaldson & Grant-Vallone, 2002:247), the review of the interview protocol reported on earlier makes it clear that although two (2) questions might be construed as performance related questions, these are only indirectly related to performance, and then not to academic or leadership performance, and so should therefore not steer participants towards giving socially desirable answers.

In summary, although self-reporting bias and the use of only one method of data collection can, under particular circumstances, be construed as a challenge to the trustworthiness and reliability of a study (Donaldson & Grant-Vallone, 2002:245, Creswell, 2014:284), the researcher proposes two factors that minimise the impact of these two biases on the study under discussion. Firstly, the data collection instrument (semi-structured interview) employed for this study was designed to minimise the risk posed by questions related to the participants’ own performance, thus reducing the risk of social desirability- or self-reporting bias. Secondly, the fact that the phenomenon under investigation (education leadership learning) is not a sensitive one, together with the fact that, after careful consideration, no triangulating second data collection method or strategy could be found that would serve to answer the primary or secondary research questions on masters’ students experiences and perceptions of their own education leadership learning from their own perspective (McMillan & Schumacher, 2014:347), meant that the use of only one data collection method for this study posed a reduced threat to its trustworthiness and was indeed “the only way to assess (the) constructs of interest” (Donaldson & Grant-Vallone, 2002:247).

#### 5.4.4 Threats to Trustworthiness - The Role of the Researcher

Kvale (2011:xi) suggests that the researcher him- or herself is an important part of his or her research process, and as such should be considered a “member of the field under study”, while Nieuwenhuis (2007:79) posits that “the researcher is the data gathering instrument”. McMillan and Schumacher (2014:356) posit that rather than denying the human subjectivity present in qualitative research, the researcher should “take it into account through various strategies”. In this regard, the concept of reflexivity - the “rigorous self-scrutiny by the researcher throughout the entire (research) process” (McMillan & Schumacher, 2014:356) - is a way in which the researcher can describe his or her role and impact on a study or project, and includes (a) a recognition of the *self* - of the researcher as part of the study, (b) a recognition of the *other* – the participants -, and allowing them to give voice to their identity and (c) a desire to “get it right” or (to be) accurate (McMillan & Schumacher, 2014:357).

As well as reflecting on and describing his epistemological and ontological positions and the impact of these on the study (see the early part of this chapter), the researcher chose to employ two (2) of the many strategies suggested by McMillan and Schumacher (2014:356-360) to enhance reflexivity as part of the trustworthiness and credibility of a study, the first being the keeping of a field log and the second the practice of auditability. In the field log, the researcher faithfully documented the processes leading up to and including the field work – the selection of participants, the arrangements for- and process of conducting the interviews and so forth, in order to produce “a chronological record by date and time” (McMillan & Schumacher, 2014:358) of the processes involved in that part of the study.

Auditability is defined as the “practice of maintaining a record of data management techniques and decision rules that document the trail of evidence” (McMillan & Schumacher, 2014:359). In the context of this study, the researcher kept a complete electronic record of all the codes assigned to the data and the themes and categories - other than the pre-determined ones - that emerged during the data analysis process. The drafts of findings and all records of preliminary findings were also preserved electronically for possible later review and audit.

## 5.5 Ethical Considerations

Researchers in all fields of research, but specifically in the social sciences, where the focus is on people, must at all times be aware of the moral issues implicit in their work, and of the possible and actual positive and negative effects their investigations have or could have on those who are involved (Cohen *et al*, 2011:75). However, research ethics are also “situated” (Cohen *et al*, 2011:77), meaning that every research context will prescribe the manner in which ethics are interpreted and applied to that specific context. In this section, the ethical issues within the context of this specific study will be detailed and described.

The ethics of social research revolve around two key issues – informed consent (Gay *et al*, 2014:16, Creswell, 2014:166, McMillan & Schumacher, 2014:130) and access and acceptance (Gay *et al*, 2014:22, Cohen *et al*, 2011:81, Creswell, 2014:252).

### 5.5.1 Informed Consent

The principle of informed consent arises from the almost universally practiced human right to freedom and self-determination (Cohen *et al*, 2011:77), embodied in the context of this study in section 12 of the Constitution of the Republic of South Africa (1996). Informed consent is achieved when “individuals choose whether to participate in an investigation after being informed of the facts that would be likely to influence their decision” (Cohen *et al*, 2011:81). Informed consent implies that participation is voluntary and that all participants must be supplied with all the information they require about the study in order to make an informed decision (Gay *et al*, 2014:21). Such information includes the purpose of the research, what participants would be required to do if they consented to participate, the possible benefits or consequences of participating in the study, their right to withdraw at any stage, the matter of privacy, confidentiality and anonymity and how the data will be used once the study is complete (Gay *et al*, 2014:22, Cohen *et al*, 2011:81, Creswell, 2014:167).

#### 5.5.1.1 Voluntary Participation

The letter of consent for this study explained that each participant’s decision to participate in the study was entirely voluntary (Cohen *et al*, 2011:80, Creswell,

2014:166) and that their choice to participate or not would in no way affect any aspect of their relationship with the university at which the programme is presented. Participants were also informed of the fact that they could withdraw from the study at any stage without any kind of penalty or consequence (Creswell, 2014:167).

### **5.5.1.2 The Purpose of the Study**

The letter of consent for this study explained that the purpose of the study was to paint an accurate picture of how students enrolled in a master's degree programme in educational leadership experienced and perceived their education leadership learning while enrolled in that programme. Explaining the purpose of the study provided possible participants with the kind of information they required to make an informed decision and therefore give informed consent, and also ensured that the researcher was seen to be open and honest with those he wished to involve in his study.

### **5.5.1.3 What Participants would be Required to Do**

This letter also spelled out in detail what participants would be required to do, i.e. to participate in an individual interview and to confirm that the transcript of their interview was an accurate reflection of what they said during that interview. It also informed them of when they could expect to be called upon to participate in the interview and of the fact that the date, time and venue of the interview would be their choice and at their convenience. Attached to that e-mail alongside the letter of consent was the actual interview protocol (included in this thesis as annexure B) to be used during the interview. The researcher believes that providing the interview protocol at an early stage would serve two purposes – in the first place it would assist potential participants to understand the nature of the study and exactly what it is they would be required to do, and in the second place it allowed participants who agreed to participate in the study the opportunity to prepare themselves for their interviews.

As mentioned above, participants were also advised that, in order to ensure that they were comfortable with the information they shared, they would be provided with a written transcript of their own interview for which they would then be required to provide final approval of both the content and the accuracy of information contained

in it. This was done in order to not only contribute to the trustworthiness of the study (Creswell, 2014:283, Cohen *et al*, 2011:185), but also in order to protect the right of each participant to freely decide whether he or she would like to continue with the study or not (Creswell, 2014:167).

#### **5.5.1.4 Benefits and Risks of Participating in the Study**

The letter of consent explained to participants that, other than their having contributed to a better understanding of how master's students experience and perceive their own education leadership learning and thus to the on-going international debate on education leadership learning, no other benefits would stem from their participation in the study (Gay *et al*, 2014:131). The letter also made it clear to participants that the study would not expose them to any undue harm or risk (Gay *et al*, 2014:132).

#### **5.5.1.5 Privacy, Confidentiality and Anonymity**

The issue of the anonymity of participants, the confidentiality of the data they provided during the study and the protection of their privacy (Cohen *et al*, 2011:82, Gay *et al*, 2014:21) was also addressed in the letter of consent – this letter made it clear that their privacy would be assured by anonymity (McMillan & Schumacher, 2014:133), and that at no time would any participant be mentioned by name or be made identifiable by any means whatsoever in either the data processing phase or in the research report. This was achieved by allocating a pseudonym (Gay *et al*, 2014:23) in the form of a participant number to each participant – participants were numbered in the order in which the interviews took place, with only the researcher having access to the password-protected document in which the participants' names and participant numbers were recorded.

The letter of consent also assured participants of the confidentiality of the information they provided – the use of password-protection on all documentation and data related to the study ensured that no one but the researcher had access to the recorded interviews or any other information, including the administrative and contact information used during the process of selecting participants.

#### **5.5.1.6 How the Data will be Used**

Participants were informed in the letter of consent that the finding of the study would be published as a thesis as required for the awarding of a degree. Participants were also informed that they would be provided with a copy of the research report containing both the findings of the study and recommendations based on those findings made by the researcher.

#### **5.5.2 Access and Acceptance**

Access involves applying for and being granted official permission to undertake a study in a specific location or using specific participants (Cohen *et al*, 2011:81, Gay *et al*, 2014:25). The success of this study depended to a large degree on both the willingness of the University that hosts the programme to allow the researcher access to its students / former students and on the goodwill of the students of the classes of 2008, 2009 and 2010 towards both the University and the researcher himself.

##### **5.5.2.1 Permission for Study – University, Participants and Ethics**

Permission to conduct a study involving the students of one of the selected University's postgraduate programmes had to be sought from the University itself. The researcher's request for such permission (included in this thesis as annexure C) also included a request for access to the academic records and the contact details of the students enrolled in the master's degree programme in educational leadership's classes of 2008, 2009 and 2010, in order to be able to identify and make contact with possible participants. Both the request for permission to conduct research among students of the University and for access to the academic records of the master's degree programme in educational leadership's classes of 2008, 2009 and 2010 were approved – a copy of the letter of permission is included in this thesis as annexure D.

The researcher received - upon request to the University's postgraduate academic administration unit - the academic records and contact details of all twenty-seven (27) master's students who had been or were enrolled in the mentioned classes, and was able, after attempting contact with all twenty-seven (27) possible participants, to secure informed consent from fifteen (15) students.

The researcher also applied for and was granted ethics approval by the Ethics Committee of the selected University – the ethics clearance certificate is included in this thesis as annexure E.

### **5.5.2.2 Venues for Data Collection**

The initial proposal for this study called for the participants to visit the researcher on campus for their interviews, with the researcher stating that, although he would be willing, if required, to travel to venues or locations more convenient for the participants, the fieldwork for this study would be conducted primarily on the University's campus. However, after concerns raised by the University's Ethics Committee regarding the ability of the researcher to protect the identities of the participants and his ability to assure their anonymity if they visited him on campus for their interviews, it was agreed that participants would be asked to suggest venues convenient to them. This was done, and only if the researcher could logically combine visits to participants who lived in close geographic proximity to one another, did he ask participants to consider specific dates and times.

However, in cases where participants requested that the researcher meet with them at their place of work, the researcher insisted upon either meeting after work hours (in the case of schools) or during a purposefully scheduled appointment (office workers / participants who do not work at schools) in order not to interrupt the activities of schools where participants may be employed or the workday of non-school participants. In the end, twelve (12) of the participants were interviewed at their place of work – of these, seven (7) interviews were conducted after school hours at the schools where the participants worked, and five (5) were conducted during scheduled appointments with participants in their offices at their (non-school) places of business. Of the remaining three (3), two (2) interviews were conducted at the homes of participants, and the fifteenth interview was conducted, at the request of the participant, after hours in the office of the researcher.

By the end of the fieldwork phase of the study, the researcher had travelled more than 2 500 kilometers and visited four different provinces in order to complete the data collection process.

## 5.6 Summary

This chapter includes details of the research paradigm (interpretivist-constructivist), research approach (qualitative), design methodology (case study) and data collection method (semi-structured interviews). This chapter also outlined the process for the selection of participants (purposive sampling) and research sites, and the processes put in place (member checking, the use of crystallisation) as well as the design aspects of the study to promote trustworthiness and credibility and reduce both self-reporting and mono-method bias. Lastly, this chapter described the ethical issues of the research contextualised for this study under the broad headings of informed consent and access and acceptance (Cohen *et al*, 2011:77–80).

## CHAPTER 6

### Education Leadership Learning - Data Presentation, Findings and Analysis

#### 6.1 Introduction

This chapter presents the findings of the study on the experiences and perceptions of students of their own education leadership learning while enrolled in a master's degree programme in education leadership at a selected South African university. The chapter begins, as suggested by Nieuwenhuis (2007:104), with a detailed description of the participants in the study, and then proceeds to present the findings of the study in terms of both the research questions that guided the study and the elements of Engeström's (1987:78) Activity Theory selected as the theoretical framework for the study and detailed in Chapter 2 of this thesis.

#### 6.2 The Participants

##### 6.2.1 Overview of Participant Selection

As discussed in Chapter 5, the fact that this study sought to understand and describe the experiences and perceptions of students of their own education leadership learning whilst enrolled in a master's degree programme in education leadership prescribed to a large degree the selection of participants – they would, in fact, all have to be registered as students of just such a programme. After the selection of a programme offered at a South African university, the selection of the actual participants from within the total population of past and present students of the education leadership programme could begin – a process described in some detail in Chapter 5. In the end, the researcher opted to invite all the students who first registered for the programme in the years 2008, 2009 and 2010 to be participants, a decision that produced a population of twenty-seven (27) possible participants. Of these twenty-seven (27) students, fifteen (15) agreed to participate. However, one (1) student decided, after the interview had been conducted, to withdraw permission for the use of the data he had provided. This left the researcher with data from fourteen (14) participants, the details of which can be found in table 6.1 below.

## 6.2.2 Participant Profiles

The following table presents the profile of the individual participants in this study.

Participant Number	Age	Gender	Class	Graduation Date / Duration of Studies	Post / Position during Studies	Educational Context	Years' Experience in Leadership prior to and at the time of the interview
P1	51	Male	2008	2013 / 5 years	Principal	Public School Quintile 5	11/12
P2	44	Male	2008	2011 / 4 years	Head of Department	Public School Quintile 5	6/8
P3		Participant withdrew permission for the use of his data after interview					
P4	47	Male	2008	2011 / 4 years	Principal	Public School Quintile 5	6/8
P5	46	Male	2008	2011 / 4 years	Principal	Public School Quintile 2	14/16
P6	38	Female	2010	2014 / 5 years	Head of Department	Public School Quintile 3	4/4
P7	49	Female	2009	Had not graduated by May 2014 / 6 years	District Manager – Education Department	Not applicable	3/3
P8	50	Female	2010	2013 / 4 years	Deputy Director – Government Department	Not applicable	2/3
P9	44	Male	2009	2013 / 5 years	Acting Head of Department	Public School Quintile 1	5/6
P10	44	Male	2009	2014 / 6 years	Educator	Public School Quintile 2	0/0
P11	55	Female	2009	Had not graduated by May 2014 / 6 years	Acting Head of Department	Public School Quintile 2	8/8
P12	39	Male	2010	Had not graduated by May 2014 / 5 years	Deputy Principal	Public School Quintile 5	3/3
P13	47	Male	2010	2014 / 5 years	Principal	Public School Quintile 2	2/5
P14	49	Male	2010	2014 / 5 years	Principal	Private School	3/5
P15	48	Male	2010	2013 / 4 years	Principal	Public School Quintile 5	3/5

Table 6.1: Biographic, demographic and educational context of participants

Apart from Participant 10, all the participants served in leadership positions at the institutions where they were employed at the time of their enrolment into the programme. In fact, the admission policy for the selected programme required all students to be employed in leadership positions at the time of their enrolment (University of Pretoria, 2011:142). At the time that the research was conducted, all participants, again with the exception of Participant 10, were serving in leadership positions at their respective places of employment, albeit some only in an acting capacity (Participants 9 and 11). Two participants, numbers 7 and 8, were employed outside of the traditional school context, one as the deputy director of an education-related project at a national governmental department and the other as a district manager at a provincial department of education.

The average age of the participants is 46.5 years, with the youngest being 38 years of age and the oldest being 55 years old. The average years of experience in education leadership for the group of participants is 6.6 years, with the most experienced education leader in the group having sixteen (16) years of leadership experience and the least experienced having three (3) years of leadership experience.

### **6.2.3 The School and Leadership Contexts within which Participants Function**

The educational context within which the participants in this study function varied greatly. Of the twelve (12) participants employed in leadership positions in schools, eleven (11) work in the public education sector and one (1) works in the private education sector. Within the ranks of participants who work at public schools, the context for each varies according to the quintile of the school at which he or she is employed. In the South African education context, all public schools are categorized according to the socio-economic conditions in the community surrounding the school, and accordingly, schools are classified as either quintile 1, 2, 3, 4 or 5 schools. This classification is done by the individual provincial education departments, and quintile 1 schools are therefore those schools that serve the poorest 20% of learners in each province, quintile 2 serves the next poorest 20% and so on, leaving the quintile 5 schools to serve the 20% of learners in each province who are least poor (Department of Education, 1998:35). Quintile 1, 2 and 3 schools are so-called *no-fee*

schools because of the fact that they may, by law, not levy any additional fees from parents in order to augment the school's income (Department of Education, 1998:37), something that quintile 4 and 5 schools are empowered to do. Consequently, quintile 1 schools are among the poorest and most under-resourced schools in South Africa, while quintile 4 and 5 schools are generally well-financed and well-resourced (Motala, 2006:82). Branson and Zuze (2012:71) posit that "the organisational and professional conditions in rich and poor schools vary considerably", with wealthy schools having the funds to appoint "more or better trained staff" (Branson & Zuze, 2012:71), while at poor schools indicators of efficient management as proper curriculum planning, regular learner assessments and high rated of educator attendance are most often lacking (Branson & Zuze, 2012:71). It is also true that, within the South African education context, the well-resourced quintile 4 and 5 schools are generally bigger in terms of learner numbers and are usually located in better socio-economic urban areas (Heystek, 2011:458), while the less well-resourced quintile 1, 2 and 3 schools are generally smaller in terms of learner numbers (Hall & Giese, 2012:37) and are generally located in the deep rural, semi-rural and so-called township areas (areas formerly reserved for black South Africans under the apartheid segregation policies) of the country. The differences in context between the schools across the range of social-economic quintiles is illustrated by for example the fact that educators and school leaders employed in the better resourced schools are on average better qualified than those employed in the lower quintiles (Motala, 2006:86, Branson & Zuze, 2012:72) and are generally more experienced (Lumby, 2015:405), and also by the fact that the learner: educator ratio in the better resourced schools is more reasonable due to the fact that those schools are able to employ additional educators from the funds collected from parents (Motala, 2006:87; Branson & Zuze, 2012:72; Lumby, 2015:403). Furthermore, there is evidence that, because of the lack of qualifications and experience among staff in lower quintile schools as set out above, such schools are usually characterised by poor school management systems (Pienaar & McKay, 2014:107). Of the eleven (11) participants in this study who are employed in the public education sector, five (5) are employed at quintile 5 and thus well-resourced schools, and six (6) are employed at quintile 1, 2 or 3 or less well-resourced schools.

This context is important in view of Christie's (2010:696) statement, referred to in Chapter 4, that the act of school leadership is context-dependent, and that school leadership is "embedded in broader social relationships and cultural understandings", and is influenced by issues such as race and gender, location and socio-economic milieu. This statement is further substantiated by Eacott and Asuga (2014:930) when they posit that, among other factors, the socio-economic and locational features of education are important pointers to the kind of education leadership learning that will be successful in varying contexts. The final word in this discussion of the importance of the context within which the participants in this study live and work, belongs to Brauckmann and Pashiardis (2011:20) who believe that in order to prepare school leaders with the skills and knowledge to work within and deal with a variety of contextual conditions, education leadership learning programmes must take into account the contextual factors and needs of school leaders.

### **6.3 The Findings of the Study – Format and Lay-out**

This study was guided by a primary research question and three (3) sub-questions. The primary research question was:

"What are the experiences and perceptions of master's students enrolled in a master's degree programme in educational leadership of their own education leadership learning?"

The section that follows will present the data – per sub-question – as it was gathered using semi-structured interviews with those students of the selected master's degree programme in education leadership learning who agreed to participate in this study.

The three research sub-questions, although posed in Chapter 1, are repeated here for clarity. The first sub-question designed to illuminate the primary research question was:

"Which aspects of the master's degree programme in educational leadership do master's students perceive as having made the greatest contribution to their own education leadership learning?"

The second sub-question was:

“Which aspects of the master’s degree programme in educational leadership do master’s students perceive as barriers or challenges to their own education leadership learning?”

The third and final sub-question was:

“What are the master’s students’ experiences and perceptions of the contribution of their own education leadership learning to their leadership practice?”

The findings for each sub-question will in turn be presented at the hand of the selected elements of Engeström’s Activity Theory (1987:78), namely *tools and artefacts*, *rules*, *community* and *division of labour*, because this study sought to understand and describe the *interaction* and *inter-relationship* between the master’s students as the *subjects* of the education leadership learning activity system and various aspects of these elements of the activity system, and how this interaction and inter-relationship influenced their experiences and perceptions of their own education leadership learning. Within each of these elements, the findings will be discussed in the themes or topics that emerged from the data during data analysis.

Please note that, throughout this chapter and the next, the participants will be referred to only by their participant numbers, i.e. P1, P2 etc. It must also be noted that all excerpts from interviews that were originally conducted in the Afrikaans language will be immediately followed by an English translation of that excerpt.

## **6.4 Findings – Research Sub-Question 1**

As mentioned above, the first sub-question to be answered in this study was:

“Which aspects of the master’s degree programme in educational leadership do master’s students perceive as having made the greatest contribution to their own education leadership learning?”

### **6.4.1 Tools and Artefacts**

As alluded to in Chapter 2, the tools and artefacts of the selected master's degree programme in education leadership learning as a learning activity system are the education leadership modules, their content and structure, readers, study guides, lectures, PowerPoint presentations and all other learning material used during the presentation of these modules, as well as the assessments, modes of delivery (how the modules are presented) and the use of ICTs by both the students and the members of the activity system community (fellow students, lecturers, supervisors and administrators) involved in the programme (Scheckle, 2014:611). This particular programme consisted of a coursework component made up of six (6) modules containing content related to various education leadership themes as well as research themes and also a research component calling for the completion of a research project and the production of a dissertation of limited scope.

The data collected during the semi-structured interviews conducted with the fourteen (14) participants sought to understand and describe the interaction and inter-relationship between the master's students as the subjects of the education leadership learning activity system and various aspects of the tools and artefacts of that activity system, in order to understand and describe their experiences and perceptions of this interaction and inter-relationship as part of their own education leadership learning. The section that follows will present the themes that emerged from the interview data related to the participants' experiences and perceptions of their own education leadership learning from (a) the learning content of the modules, (b) the learning materials that supported that content, (c) the teaching and learning strategies employed to present these modules and (d) the assessment strategies employed in the modules and the use of ICTs during the programme.

#### **6.4.1.1 Module Learning Content**

In general terms, the participants indicated that they experienced and perceived their participation in the modular section of the programme as a positive learning experience, with descriptors such as interesting, developmental, empowering, beneficial and meaningful emerging from the data. In this positive vein, a number of

definite themes emerged during the analysis of the interview data – these will be discussed in more detail in the sections that follow.

#### 6.4.1.1.1 The content empowered participants as leaders

A number of the participants mentioned that they experienced the content of the modules as empowering, and that these modules had empowered them to do their work as school leaders better.

*Almal het my rêrig bemagtig om my werk as 'n hoof beter te doen – die groot waarde wat byvoorbeeld Education Law vir my het is dat jy jou gemeenskap kan beskerm om nie in 'n slaggat te trap nie...dat jy jou Beheerliggam ook kan beskerm en kan bemagtig...bemagtiging is hier vir my baie belangrik*

translated as

*Every one (of the modules) really empowered me to do my job as a principal better – the value that for example Education Law had for me was that I was able to protect my community from (legal) potholes...I could protect my Governing Body too, and could also empower them...empowerment is very important to me here – P1*

While Participant 1 experienced the education leadership learning as empowering him to protect and empower others, Participant 4 believes that he is better able to protect himself after having completed the leadership learning modules.

*Die kennis wat jy by die onderwys reg opgedoen het, bemagtig jou op 'n baie ander manier...ewe skielik word jy nie meer geboelie deur 'n ouer nie wat dink jy weet nie veel nie...omdat jy vir hom kan sê die wet sê dit...en die selfde ook met jou beheerliggaam, want die beheerliggaam wil baie keer goed doen, dan kan jy sê, maar weet jy, dit en daai en doer...*

translated as

*The knowledge you gained in education law empowered you in a different way...suddenly you are no longer bullied by a parent who thinks you know nothing...and the same with your governing body, because the governing*

*body often wants to do wrong things, and then you can say, you know what, this and that and the other... - P4*

Another participant who had recently been appointed to the principalship of a new school, experienced his empowerment as follows:

*The school I was appointed at as a principal, it has a lot of problems...it was not having a principal for three years, so there was no discipline...so it assisted me, I knew what I needed to do...I was able to manage the situation without fighting by just keeping records and taking the proper steps – P5*

#### 6.4.1.1.2 Participants gained leadership confidence and a leadership identity

Another strong theme that emerged relating to the learning content of the education leadership learning programme was a change in the participants' perception of themselves as leaders and the development of confidence in their own leadership abilities.

*I was never like before...it gives you confidence...there is nothing that can set you free, you know, like having knowledge and knowing what you are doing...as an educator, I know now exactly what I am here for – P10*

Participant 6, as an inexperienced school leader, explained her experience of her education leadership learning in terms of her confidence as a school leader as follows:

*I think I had a wonderful experience...in the beginning I was a bit...I thought I was a little bit challenged in the sense that the group of students that I attended with – most of them were principals and deputy principals, so in the beginning I was a bit challenged – I thought maybe that this course wasn't meant for me, but later I began to gain confidence as we were sharing those experiences, and with the help that I was getting from those colleagues and also from my lecturers who were very much supportive at that particular time – P6*

Later on in the interview, she had the following to say:

*Before (this programme) I couldn't do initiate things because there was always this issue of fearing and fearing and not putting things to the test...but now I am no longer fearful...I can approach things boldly - P6*

*I needed to benefit the knowledge and gain skills and change a little bit in my attitudes, and at the very same time I should be able to go and apply these skills at the workplace, wherever I was, because I was studying to develop myself to become better at the workplace situation – P5*

The most definitive statement in this regard comes from Participant 13:

*That leadership course, it gave me a strong confidence in my leadership as a principal – P13*

#### 6.4.1.1.3 Participants realised their own education leadership short-comings

A number of the participants pointed to the fact that the learning content had shown up some of their own weaknesses and shortcomings as education leaders.

*Dit het ook vir my my tekorte uitgewys, wat 'n ou dan aan aandag kon gee*  
translated as

*It also showed me my own shortcomings, that I could then pay attention to – P1*

Participants 11 and 13 mentioned the fact that the learning content in the modules gave them an understanding of what should be happening at school level.

*The time I was exposed to these modules, the first thing that I realised was there are many things in the teaching fraternity that I did not know, so it widened my knowledge and understanding of the profession – P13*

*It made me aware of the mistakes that leaders do at school, and the mistakes that we do at school, and it also made me aware of the things that we are*

*supposed to do when we are in the school environment...and how teachers must behave, and how the school money should be managed and so on – P11*

Participant 14 spoke specifically of his realisation of the shortcomings of his leadership *persona*.

*Ek het besef ek het 'n leemte in my leierskapsmondeering...en ek dink almal het...as 'n ou dink jy het dit nie, dan het jy nog net nie besef jy het dit nie*

translated as

*I realised I had a shortcoming in my leadership persona...and I think every has...if someone thinks he does not, then he just hasn't realised it yet – P14*

He followed on from that statement to explain how the education leadership learning that he experienced during the modular section of the programme influenced and changed that *persona*.

*In daai opsig het dit my leierskapsstyl beïnvloed...dit het my 'n weyer perspektief gegee oor my besluitneming en my totale leierskap...jy weet, ek sou dalk 'n baie meer eng leierskapsmodel gevolg het as 'n ou nie hierdie agtergrond gehad het...weet jy wat was vir my 'n 'revelation' gewees...nou besef ek, mens moet pasop, want my persoonlikheid is meer mens-georiënteerd, maar ek moet ook die taak in aanmerking neem...ek moet daai balans hou, en dit bring 'n ou daai balans*

translated as

*In that respect it influenced my leadership style...it gave me a broader perspective on my decision-making and my entire leadership persona...you know, maybe I would have followed a far more narrow-minded leadership model if I didn't have this background...do you know what was a revelation for me? I realise now that I have to be careful, because my personality is people-orientated, but I must also consider the task...I must maintain that balance, and (the programme) brings that balance – P14*

#### 6.4.1.1.4 The theory learned could be applied to practice

As an introduction to the discussion of this theme, the following general comments by the participants are apt:

*I liked the content (of the modules) in the sense that I was relating it to work experience...although I had little experience at that time, it was sort of building up towards my career, and it was linking with everything that I was doing, because it was school related – P7*

*That module contained the IQMS inside it, and all about the appraisals of educators at schools - it helped us to contribute to what we are doing at school...I found it a very relevant module in particular...for my work at school – P10*

Participant 2 enjoyed the immediacy of the practical application of what he had learned during the coursework section of the programme.

*Jy weet, jy kon dadelik goed gebruik het...as jy uit 'n ding uitgekom het, veral hierdie 'law', jy kon dit sommer daai hele volgende week, al het jy nog nie die graad gehad nie, kon jy dit toepas*

translated as

*You know, you could immediately use things...if you came out of a lecture, especially that law module, you could apply it for the whole of the next week, even though you hadn't completed the degree yet – P2*

Participant 4 reported that much of what he learned from the content of the modules, he applied at school in order to change the way he leads and manages the school.

*Kyk, behalwe dat ons dit in teorie net bespreek het, kon mens dit...van dit kon jy terugbring en in die skool situasie ge-implimenteer het. Ek dink baie van daai goed wat ons daar geleer het in daai ding, het ek op 'n subtiele manier hier by die skool begin toepas - die ouens se bestuurstake verander en hulle*

*op 'n ander manier begin aanwend en so aan, veral onder die skool bestuur - translated as*

*Look, even though we discussed things in theory in the classroom, you could...take some of it back and implement it in the school situation. I think that many of the things I learned in that thing (the programme), I subtly implemented here at school – changing my guys' management tasks and changing their management applications, especially among the school leadership team members – P4*

A number of participants found the practical skill of being able to draw up a budget empowering, not only to themselves as school leaders, but also to the School Governing Bodies (SGB) of their schools.

*That year I got (elected) onto the governing body of the school, so I could actually see now how the budgeting process takes place and be involved in it, so that I enjoyed that – P12*

*The course on accounting gave me a background in terms of how to manage the funds of the school... I did not know much about budgeting, but now, as a member of the school governing body, I find myself assisting the SGB in terms of how to allocate funds, and that sort of background has been found in this course – P13*

*Sonder daai modules sou ek dit nooit geweet het nie...ek besef nou dat hierdie tipe model is nie volhoubaar by ons tipe skole nie, en ek sien die gevaartekens raak, en 'n ou probeer juis, met die kennis wat jy daar verwerf het, om die skool te red van finansieële ondergang*

translated as

*Without those modules I would never have known...I realise now that this type of model is not sustainable at our types of schools, and I see the danger signs, and I try, with the knowledge I gained there, to save the school from financial ruin – P14*

Participant 12 gave a very clear example of the application of the learning he had experienced.

*I can now explain to the students practically exactly how vicarious liability works, what you need to look for, what you must be careful of and things like that – P12*

When prompted to explain how this knowledge has been applied in his school, his answer was very specific.

*We've got governing body teachers (additional teachers employed by the school rather than by the Department of Education)...we've got about six governing body teachers...and a lot of them are involved in sport, especially in our third term when we focus a lot on athletics, so what we do now - because of that - all our sports coaches have coaching certificates...we don't just say we need a soccer coach, so you and you go and coach soccer...you know...we've also sent all our teachers on first aid courses, so if something happens, they know the basics of the sport, they know the basics of first aid - P12*

One participant, while discussing the issue of putting theory into practice, mentioned that the programme also provided for the theory *behind* some of the practices that the students already knew and were applying as part of their leadership practice.

*Al die jare was 'n ou maar blootgestel aan hoe om die begrotings op te trek, maar jy het nooit die teorie rondom dit behandel nie, so die teorie het vir my gesê hoekom doen jy 'n ding so - dit was ook vir my goed*

translated as

*All those years we were exposed to how to draw up a budget, but you never learned the theory around it, so the theory told me why we do it like this – that was also good, in my opinion – P1*

The excerpts above link this finding to the earlier finding that participants experienced the learning content of the programme as empowering to both themselves and to their greater school communities.

Apart from reporting that the theory was eminently applicable to their education leadership practice, the participants also experienced much of the education leadership learning during the modular section of the programme as *practical* – meaning that the modules often went further than just the mere *exposition* of theory by providing them with opportunities to *practice* what was being taught.

*What I liked about these modules was the approach...they were practical. We would discuss something that was said by this author, (and then) we become practical - to our real-life situation - on how to handle leadership... It was more practical...yes it is about theory, but we also had to site practical examples...case studies...because it doesn't help to feel like you quote this author ...all those authors...and we don't face the real-life situations...that is what I liked about the programme – P8*

*The way she would help us link what was happening in the school environment with what we were doing in the lectures, because time and time again we would reflect on giving practical examples of how we should handle issues, especially in...you know...management positions... (for example) this is what you need to be careful of when you are dealing with cases like this – P6*

*I actually quite enjoyed that one...there were a few practical things which we did in that one...I think we had Dr XXX...he helped us identify our own individual learning styles so that we could carry that over into the classroom – P12*

#### 6.4.1.1.5 Modules provided an introduction to instructional leadership theory

On the issue of the leadership theory that underpinned the programme, participants reported that the programme had introduced them to instructional leadership.

*The concept that was really an eye-opener to me was instructional management...um...when I did BEd I never met this issue of instructional management wherein the principal of the school is supposed to be the manager of the school but also the instructional manager in the school, especially in teaching and learning...it has a lot to do with the culture of teaching and learning at school – P10*

Participant 9 made the connection between instructional leadership, school culture and school climate:

*(The module) Leadership of Learning is the one that is really concerned with classroom management and school management, so in this one we really gained a lot...I have learned that leaders can make a change in a school, and I have also learned a lot about (school) culture and the climate, which are very very important, and that is why I am saying this one is very empowering for us as leaders - it is the desire of any leader and any teacher to learn this module – it is very important – P9*

Participant 5's experience with the concept of instructional leadership brought to light for him the fact that, although he relies on others to lead the process of instruction at school, as the principal, he remains responsible for leading the teaching and learning at his school.

*In this one (the module Leadership of Learning), what I benefitted the most in it is about curriculum management - leading the curriculum as the principal, because most of the time when you are at school, you depend on the HOD's (Heads of Department, also known as of middle managers or senior teacher), that they have to manage the curriculum, so this one assisted me in managing the curriculum – P5*

The following excerpt from the interview with Participant 13 provides the perfect summary of the discussion on the participants' experience and perceptions of their

own education leadership learning at the hand of the content of the course work modules:

*All those modules, in my view, they are like streams that give a big river...I would say the programme itself is a big river, and these modules are small streams that give this big river ...so to me, all of them were very important – In fact, the modules covered my expectation and gave me bonuses because some of the things that I learned, I did not expect – P13*

#### **6.4.1.2 Module Learning Materials**

The second aspect of the element tools and artefacts investigates the participants' experiences and perceptions of the learning material provided for the modules in the programme. It is fair to say, after close scrutiny of the data, that the participants' experiences with- and perceptions of the learning material as part of their overall education leadership learning experience are overwhelmingly positive, with many reporting that this material has become a vital resource to them in their daily functions as education leaders.

*It is a resource - I remember this year when we were having a problem with the financial management with the principal...he was...um...he was terminating the duties of the developmental committee at school – he said the development of the school is in the hands of the principal, so I went back to my study material and I took this article by this guy...um...I forgot the name...but he wrote a lot of material about financial management relating to SASA (the South African Schools Act), so I took that one to school to show my colleagues that what the principal is saying is not right – P11*

*Onderwys reg was goed...daar was baie baie studie material...ek gebruik trouens nog van dit*

translated as

*Education law was good...there was lots and lots of study material – I still use it even today – P4*

*So I have kept almost all of them (the readers), and they really helped us in gaining information and the content was really good and very empowering, so we didn't have a problem when it came to the content – P9*

*I am still using those (readers) – I am still having those study guides...I am still using them, you know – P7*

*I am still having them (the readers) - I cannot throw them away, because I think I am going to use them for the rest of my life – P9*

#### **6.4.1.3 Instructional Applications / Teaching and Learning Strategies**

The third aspect of the element tools and artefacts investigates the participants' experiences and perceptions of the instructional applications or teaching and learning strategies employed for the modules in the programme. As part of their experiences and perceptions of their own education leadership learning, the participants identify a number of instructional applications or teaching and learning strategies – these will be discussed in the section that follows.

##### 6.4.1.3.1 The use of instructional applications appropriate to adult learners

The most prominent finding about the instructional applications or teaching and learning strategies is that the participants generally experienced and perceived these applications and strategies as appropriate for adult learners, and that this fact had a positive influence on their own education leadership learning.

*I prefer it if someone would talk, and then I would also use my own thinking and go and research so that I can add to what I have been given, so this thing of the approach...(in some modules) we were encouraged to research, because we were given references...for me it was like we were empowered - P8*

Coupled to her statement above, Participant 8 specifically mentioned the need for the use of instructional applications or teaching and learning strategies appropriate to adult learners.

*When you are teaching adult learners, you always have to consider that they are not coming to class empty...they bring along a lot of experiences, and then you have to take that into consideration. Although the lecturer might be presenting, we learn from each other through those interactions. When you are working with adults, you don't just impart knowledge to them...you must understand that they are also knowledgeable...they are experienced teachers and leaders, and they are in the field. What I liked about the approach here was that it allowed us to come with our own experiences...whereas the lecturer as also giving us his experience...it was like information sharing – P8*

The use of applications and strategies applicable to adults is substantiated by a number of other participants.

*Ja, I think it was appropriate, because as students, and very responsible ones, we don't expect someone to stand in front of us...you know...and give us all the information, we must take the initiative...we must do something to indicate that we understand...and when we don't understand, the lecturer can help us – P9*

*Ek is nie die tipe ou wat ge-'spoonfeed' wil word nie – as jy verwag het vir 'n meestergraad dat jy ge-'spoonfeed' gaan word, dan gaan dit nie aan jou behoeftes voldoen nie. Nee wat, dis net 'n basiese riglyn – dis die bylees wat die verskil maak, dis nie wat in daai gidse staan nie*

translated as

*I am not the type of guy who wants to be spoon-fed – if you expected in a master's degree to be spoon-fed, then it (this programme) would not meet your expectations – it is the additional reading that makes the difference, not what is contained in the study guides – P14*

*As jy 'n kind leer, dan moet jy eers die problem stel en al daai goed, maar ek dink...ons volwassenes, jy leer op 'n ander manier... jy vorm jou eie probleemstelling, jy weet...so al die verantwoordelikheid is nie op die 'presenter' nie*

translated as

*When you teach a child, you first have to set a problem and all that stuff, but I think...we adults, we learn in a different way...you form your own problem statements, you know, so all the responsibility (for learning) does not rest on the presenter – P1*

#### 6.4.1.3.2 Individual self-study

From the interview data it is clear that the participants experienced a number of different instructional applications or teaching and learning strategies within the framework of applications that were appropriate to adult learners during the course work part of the education leadership learning programme - the first of these was the requirement that they do a lot of the work for the programme on their own.

*I gained momentum because of the way in which Prof X was giving us the content, and he did not just give us everything – he also indicated to us that we must work the course on our own so that we own the course...we own the content...and you know, as I am speaking, at our school, I am trying by all means to practicalise what I learned – P13*

*We were expected to read...only some specific issues were dealt with by the lecturers, but we were expected to contribute based from our understanding and experience, so that we are able to use these skills when we are in practice – P5*

#### 6.4.1.3.3 Class discussions

The participants reported the extensive use of discussions as a means to facilitate their learning.

*Dit was maar meestal aanbiedinge gewees...daar was tye wat ons...jy weet, twee-rigting kommunikasie gehad het*

translated as

*It was mostly presentations, but there were times, you know, when we had two-way communication - P1*

*I really liked it, because in most cases we were discussing, you know...and you were able to see that if you were not involved in discussion, you could see that, no, I am behind – P7*

*The mode differed depending on the lecturer, but generally they were good, because they were encouraging group discussions in most cases – P9*

Participant 4 highlighted the initial difficulty that he and others experienced with the use of discussions as an instructional application or teaching and learning strategy.

*Wat aanvanklik vir ons moeilik was...onthou, ons het nooit onself in daai situasie bevind nie...jy was gewoon aan die ou gee die klas, jy het kom sit en ontvang, en ewe skielik word dit 'n bespreking ding, en dit was vir my op 'n stadium baie lekker gewees.*

translated as

*What was initially difficult for us...remember, we had never found ourselves in that situation before...we were used to a guy teaching, and you just came and sat and received, and then suddenly it became a discussion thing, and at some stage I really came to enjoyed that – P4*

#### 6.4.1.3.4 Student presentations

One of the major instructional applications or teaching and learning strategies identified by participants was student presentations. From the data it appears as though many of the module presenters required students to prepare and present portions of the programme.

*Ons het kort aanbiedings gedoen oor goed...van die ander ouens se goed was regtig goed gewees*

translated as

*We did short presentations about things...some of the other guys' stuff was really good - P4*

*There were times when we were given a chance to do presentations as part of our assessment, so somehow I think it shaped me to become what I am today – P6*

*They just give you an introduction, and from there they will ask us to do some presentations – P9*

*Sometimes we were even given time to do some short presentations and we will be...you know...gaining a lot from other students – P10*

*We had an opportunity to stand up in front of other students and to engage...to interact...to ask questions, with the lecturers also helping us, correcting us here and there...for us, it really helped us – P8*

*That one of presentations is good, because that method will introduce you to research, actually...you research and the thereafter you present, so at least that one is empowering – P9*

From the excerpts above it is clear that the participants experienced these student presentations as an opportunity to grow and develop as leaders. This is further substantiated by the following excerpts:

*Een ou wou so bietjie meer doen, en dit het die ouens regtig ge-inspireer, en ek dink daai het ook van die ouens op 'n ander vlak begin plaas van aanbiedings doen...onthou, meeste van ons ouens staan net en praat van 'n papiertjie af, en ewe skielik word jy gedwing om 'n 'PowerPoint' te maak, en sulke goed, so dit was vir my baie positief. Ons het toe dieselfde ding by die skool begin doen...ons het vir die ouens gesê jy gaan doen, so dis ook iets wat jy vat en dan voorentoe gebruik.*

translated as

*One guy wanted to do a little extra, and that really inspired everyone, and I think it placed some of the guys on a different level as far as presentations are concerned...remember, most of us just stand and talk from a piece of paper, and all of a sudden you are forced to use make a PowerPoint and so on, so I*

*think it was very positive for me. We then started doing the same thing at school, so this is also something that you took and could use again in the future - P4*

*Presentations, because that is where I improved a lot...because before I did not have the confidence to stand before people and when I started it was very difficult for me, but towards the end I was doing very well – it gave me confidence – P11*

The positive experience of most of the participants of the programme's use of student presentations and discussions as instructional application or teaching and learning strategy is summed up succinctly by Participant 14 when he says:

*Ek hou van die visuele aanbieding en die besprekingsmodel...van dat daar altyd 'n 'discussion' plaasgevind het*

translated as

*I like the visual presentations and the discussion model – the fact that there was always a discussion – P14*

#### 6.4.1.3.5 Sharing of experience and experiences

The opportunity to not only share their own experiences but also to share in the *experience* and *experiences* of others is an instructional application that the participants flagged as having contributed positively to their own education leadership learning. This finding substantiates and is closely linked to the finding that the participants experienced the use of class discussions as having added value to their own learning.

*There were some where we had good discussions...the one (module) about the management and leadership of learning and in the education law (module) we had good discussions, because you obviously have your...as a teacher...your own idea of how things should be done, and when you see what the law says, you begin to open up about your own experiences...I found those discussion very valuable, because a lot of the time there is someone*

*else who has experienced the same thing as you, but has adopted a different approach, and had come up with obviously different results, or the results that you want to get to, but you don't know who to get there, so I found the discussions very valuable – P12*

Participant 8 highlighted the fact that, in sharing their own experiences with others and in sharing the experience of others, students were able to identify their own mistakes and misconceptions, thus adding to their education leadership learning and their leadership practice.

*Sometimes the things that we do, we think that they are correct, and they may be not, so we were given an opportunity to share our own experiences – I had my own frustrations in the work environment, and I had to relate it...whilst we were in the classroom, and I had to get opinions...sometimes it helps you...it was like you are getting information – not only from the books, but also from other experienced learners - we were given this one where we had the opportunity to share and to benefit – P8*

Later she reflected on the *real-life* learning that stemmed from the *real-time* experience of one of her fellow students.

*One of our colleagues who was acting in a leadership position who was a school principal and then they came and interviewed him and he didn't get the position...someone else got the job, and he was able to share that experience...to us it was a case study...because we took that example...we analysed it in class, to empower him and us - P8*

#### 6.4.1.3.6 Collegiality and cooperative learning in the learning activity system

A number of participants reported on the collegial nature of the learning environment and how they experienced this collegiality as a positive influence on their own education leadership learning.

*Nie een ou daar het hom beter geag as die studente nie...ons as studente is nooit behandel as minderwaardig nie ...nooit het jy gevoel eintlik is jy onnosel, eintlik is jy minderwaardig, so daai ding van ek respekteer jou menswaardigheid, ek respekteer jou as 'n mens...dit het vir my baie beteken*

translated as

*No-one thought of him-or herself as better than the students...we as students were never treated as inferior...never did you feel that you are stupid or inferior, so that thing of I respect your humanity, and I respect you as a human being...that meant a lot to me – P1*

Participant 8 mentioned her perception of the community within her particular education leadership learning activity system as a family, and the positive contribution to her education leadership learning she experienced from this.

*The interaction with your lecturers...it is a family unit...the bonding that you have with your other peers because of this thing of talking to each other, discussing in groups, you end up knowing each other better...this thing of helping each other...you have this article, let's go together to the library and then let us just research...and also in terms of the lecturers...their willingness, their approach, where it is easy to call a lecturer and say can I come, or you send an email ...can I come at this time, I need help, for them, they are always open to help the students – P8*

This is substantiated by Participants 10, 11 and 13.

*The lecturers were committed...they were very encouraging to us and they really wanted us to succeed – P11*

*I would say they treated us more like colleagues than, you know, like educators – P10*

*The culture of humanism...you know...from all those lecturers that were involved in the programme – personally I had a challenge of being sick - but*

*when I came back, there was this kind of 'ubuntu' (African culture that states that I am because you are) that I read from the lecturers – P13*

This collegiality is aptly summed up by the following excerpt:

*I was able to understand together what I was not able to understand alone - P5*

#### **6.4.1.4 Assessment**

As part of the element of tools and artefacts, the majority of participants experienced and perceived the assessment strategies, especially the use of portfolios of evidence employed during the programme as having had a positive influence on their own education leadership learning experience, as can be seen from the following two excerpts:

*That (activity) of making portfolios...I learned the most from that...it was very helpful, especially for the school situation – P10*

*Dit was vir my baie sinvol...veral die portefeulje was vir my 'n goeie manier om te assesseeer*

translated as

*It was very meaningful...especially the portfolios - this is a good way to assess -P1.*

#### **4.1.5 The Use of Information and Communication Technologies (ICTs)**

As part of the tools and artefacts of the education leadership learning activity system, ICTs played a significant role in participants' experiences and perceptions of their own education leadership learning during their participation in the master's degree programme in educational leadership learning. A number of themes in this regard emerged from the interview data.

#### 6.4.1.5.1 Exposure to and practice in the use of the internet

Many participants revealed that their participation in the programme represented their first proper exposure to and practice in using the internet.

*I studied at a time when we were not exposed to internet...researching the journals and so on...we used to go to the library where you would find there are journals there, bound journals, paging through them, spending a lot of time there...so when I was there (in the master's programme), this thing of study material and research support, where we were trained on how to research and get journals and references and articles and whatever, it really helped a lot – P8*

*In the first three months, for those first three modules, it was quite a challenge in the sense that we had to do a lot of computer research to find the articles and we had to learn first how to search for those articles, but once we were able to know how to search, it became easier, but when we started, it was a great challenge, and as the days went by, with more practice, then it became easier – P5*

The issue of exposure to and effective use of ICTs is aptly summed up by the following excerpt from the interview with Participant 13:

*I started with how to operate a computer...quickly I learned how to operate a computer, and life was becoming easier...then I quickly learned how to access information through the internet...life was even easier for me now...I also learned how to compose my own e-mail – I had my own email address, life was easy...I could communicate directly with my lecturers and with whoever I wanted to communicate – P13*

#### 6.4.1.5.2 Value of internet and research training provided by the Institution

Participants' experiences and perceptions of the computer, internet and research skills training provided to masters' degree students varied – some experienced the training as valuable, while others experienced it as of limited value to their education

leadership learning. The following excerpts illustrate the fact that some participants found this training valuable.

*I didn't have the techniques for searching through the internet, but because there were research support sessions that were conducted by the University, made my work a little bit easier – P6*

*So when I was there, this thing of study material and research support, where we were trained on how to research and get journals and references and articles and whatever, it really helped a lot – P8*

*We were also introduced to the computer system, because, you know, we were born before technology...me myself, I even struggle now to work with the computer, but when I was there, I can remember, I could type my assignment, but I was just slow – P11*

As mentioned earlier, some participants were not entirely convinced of the value of the internet and research skills training provided by the Institution:

*Hulle het ons opgelei, maar ek het nie veel daarvan verstaan nie, en nou klink dit 'stupid', maar dis my ervaring,...maar definitief het ek van die internet geweldig gebruik gemaak*

translated as

*They trained us, but I did not understand much of it, and now it sounds stupid, but that was my experience...but I definitely made great use of the internet – P1*

*Die biblioteek se goed was redelik toeganklik en die ouens het ons met die rekenaar goed probeer help, maar ek weet nie of daai soort van stelsel so gebruikersvriendelik is nie*

translated as

*The library's stuff was reasonably accessible and the guys tried to help us with computer stuff, but I don't know whether that sort of system is user-friendly enough – P4*

#### 6.4.1.5.3 The Institution's use of an electronic learning platform

Once again, participants' experience and perception of this aspect of the tools and artefacts of the education leadership learning activity system varied – although a number of participants experienced and perceived the use of the electronic platform as having contributed positively to their own education leadership learning, others indicated that this platform was, in their experience, not utilised properly, and therefore their perception of it as part of their own education leadership learning is not a positive one. The excerpts that follow serve to illustrate the observation made above. However, it must be noted that, because the name of the electronic platform reflects the name of the institution hosting the master's degree programme in educational leadership selected as the research site for this project, it will be referred to in the excerpts simply as *name of platform*.

*Yes, I use it more often because some of the information regarding how to prepare the assignments and stuff, we got it from the (name of platform) – P6*

*I think in terms of...what is it called... (name of platform)...it was very good, because a lot of our stuff was on there - I would say that most of the modules would direct us to (name of platform)...others would just say the notes are on (name of platform) or the assignment is on (name of platform), go there...so this was positive – P12*

Those participants who reported the use of the institution's electronic platform as having made a contribution to their own experiences and perceptions of their education leadership learning, had the following to say:

*(Name of platform) is nie ordentlik gebruik nie...jy kan baie duidelik sien wie is die ouens wat bietjie weet van (name of platform) en bietjie moeite doen daarmee*

translated as

*(Name of platform) was not used properly...you can see very clearly who (among the institution's staff) knows a bit about (name of platform) and who goes to a bit of trouble with it – P15*

*Die kommunikasie...ek het min van (name of platform) gebruik gemaak...nee, ek het nie rêrig dit gebruik nie*

translated as

*The communication...I didn't often use (name of platform)...no, I didn't really use it – P1*

*Die gebruik van die rekenaars en die (name of platform)...die (name of platform) was nie altyd vir ons so maklik toeganklik nie, maar ek dink dit is ook omdat ons nie al die kennis gehad het rondom dit nie*

translated as

*The use of computers and the (name of platform)...the (name of platform) was not always easily accessible for us, but I think it was because we didn't have all the knowledge in this regard that we required – P4*

#### 6.4.1.5.4 The attainment of academic and research skills

Participants experienced the attainment of research and other academic skills as having made a valuable contribution to their experience and perceptions of their own education leadership learning, as is evident from the following excerpts:

*Dit het my geleer om 'n soektog na kennis te onderneem...so ek het in 'n gewoonte gekom, as ons praat oor waardes, dan gaan kyk ek wat is op die internet beskikbaar...en 'n ou het maar geleer om te onderskei tussen goeie bronne en slegte bronne, so dit het my rêrig gestimuleer en 'n kultuur by my aangekweek om weier te soek as net dit wat jy in jou kantoor het*

translated as

*It taught me to search for knowledge...so I got into the habit of, if we are talking about values, to go and search for what is available on the internet...and one later learned to distinguish between good and bad sources, so it really stimulated me crew a culture in me to search beyond just what I have available in my office – P1*

*I think the main thing was it helped me develop research skills, so that was the one big benefit - the research...it taught me how to research. That culture of doing research for everything...I mean, I won't now just suddenly jump into things...if there is a school that wants to come and speak to our learners, I'll go and do research on the school. I would say that there is a culture of research at the university which is beneficial, you know...it is not just the academics you focus on, but it teaches you to look at things critically – P12*

#### **6.4.2 Rules**

The next element of the education leadership learning activity system to be reported on here is rules. The rules of the education leadership learning activity system as it presented itself in the selected master's degree programme in educational leadership included all the rules, practices, culture and traditions of that programme (Hardman, 2008:73, Scheckle, 2014:616). These included, among other things, the rules, practices, culture and traditions concerning for example contact session attendance, assessment / task / assignment completion and submission, communication among students and with lecturers and so on. This study sought to understand and describe the students' interaction and inter-relationship as subjects of this activity system with the rules of the system and, through the rules, with the community of the activity system, and how this interaction and inter-relationship influenced their experiences and perceptions of their own education leadership learning.

##### **6.4.2.1 Rules Boosted Participants' Confidence in Their Own Abilities**

A number of participants reported that their interaction with rules applicable to admittance to the programme, and the fact that the rules called for selection rather

than just a blanket acceptance of students, contributed to their own education leadership learning by boosting their confidence in their own leadership abilities.

*Dit was nogal intimiderend, want dis 'n nuwe veld, en jy weet jy kan nie daar gaan sit en 'nonsense' praat nie, en wanneer jy dit suksesvol kon afhandel, het dit 'n ou se selfbeeld nogal 'n bietjie ge-'boost', jy kom agter jy is nie heeltemal so 'n bobbejaan nie*

translated as

*It was quite intimidating, because it is a new field, and you know you can't go and sit there and talk nonsense, and when you were able to complete it successfully, it boosted one's self-image – you realise you are not a complete baboon – P1*

*Dit het vir my die gevoel gegee dat hier regtig keuring is, en nie enige ou gaan toegelaat word nie, en dus dat rêrig die ou hout afgeknip word want hulle wil seker maak jy kan – daar is 'limited space'*

translated as

*It gave me the feeling that there really was selection, and that not just anybody was going to be admitted, and therefore that they really are cutting away the dead wood, because they want to ensure that you will make it, because there is limited space (in the programme) – P15*

#### **6.4.2.2 The Rules Created Discipline which Benefitted Learning**

A number of the participants expressed appreciated for the manner in which their interaction with the rules of the education leadership learning activity system enhanced their experience and perception of their own education leadership learning.

*(The rules) assisted me to be disciplined...here one had to manage his time effectively in order to be able to comply with all these rules...you had to just adjust here and there. They were assisting us to be disciplined and knowing what is supposed to be happening all the time, so you were able to plan in advance – P5*

*When I was completing my first year, the head of the department wrote us letters to say that if we don't defend, then we would not be able to make it on*

*time - although it sounded a little bit harsh, it sort of pushed me...you know...towards preparing myself for the defence – P6*

*They (the rules) gave me courage, because at the end, where there are rules, one becomes disciplined - I really got to be disciplined in my studies, and in the end I managed to get what I wanted – P9*

*There are regulations and rules, they (the university) stick to them and as they stick to them, it makes you to know exactly what is happening and when, and I have enjoyed that. Gradually it shifted me, as I work, to stick to the rules and regulations in my own work to say on this day we are doing this...like even imparting this to the learners so that they understand exactly what they are supposed to do and when and how, and forcing them also to recognise the issue of time – P10*

*Weet jy, dit het dit vir my maklik gemaak, want ek het geweet wat die verwagtinge van die universiteit se kant af is*

translated as

*You know, it made it easy for me, because I knew what the expectations from the university's side were – P14*

*One thing that I can mention is that thing of doing things according to the rules...sticking to the rules...I think that is one of the best things I have learned – P9*

#### **6.4.2.3 The Rules Prescribed Dedication, Hard Work and High Standards**

A significant number of participants reported that the rules of the education leadership learning activity system contributed to their experience and perception of their education leadership by making them aware of the need for dedication to their own learning and for the need for hard work and to maintain high standards.

*Wat vir my uitstaan is die vlak van die werk wat jy moet lewer...dat jy altyd op 'n hoë vlak werk...altyd 'n goeie produk moet lewer*

translated as

*What stands out for me is the level of the work that you have to deliver...that you always have to work at a high level...always have to produce a good product – P1*

*Hier gaan jy hard werk, hier moet jy swot, hier jy gaan nie jou graad verniet kry nie...en dit het so gebeur...dis darem 'n graad wat iets nog werd is*

translated as

*Here (at the university) you are going to work hard, here you will have to study, here you will not get your degree for free...and that is how it worked out...this is still a degree that is worth something – P2*

*'We mean business'...dit gaan hier oor waarde toevoeging...hier doen jy 'n ding reg...daar's nie 'middle-measures' nie, die standaarde van die (name of the university) geld. Ek het vinning agtergekom hierdie ouens gaan hoë eise aan my stel, en ek was bereid om dit te doen*

translated as

*We (the University) mean business...here it is all about adding value...here you do things right...there are no middle-measures, the standards of (the name of the University) apply. I quickly realised that these guys were going to set high demand for me, and I was prepared to do it – P14*

*The standard of excellence – it is high...to be disciplined in your studies, to be able to show commitment to your studies, knowing that you are registered for a particular purpose and that in the end you have to achieve that – P5*

Participant 13 talked about the culture of dedication brought about by the rules of the education leadership learning activity system, and how his recognition of these rules has led to a change in his practice at both school and union level.

*In this programme the culture of dedication...hard work...you know, this culture of hard work is not only in me...immediately you leave here – this culture from the programme has moved from me to the teachers with whom I work, and not only to the teachers with whom I work...even to the unionists in the executive committee that I work with...even members of the branch that I am leading – P13*

A number of participants reported on the aspect of contact session attendance as part of the rules of the activity system that contributed to their experience of their own education leadership learning:

*Ek wou nie 'n lesing mis nie, want 'n ou mis te veel*

translated as

*I did not want to miss a lecture, because you miss too much – P1*

*We knew that it was very much important without the university emphasising it that it is important to attend – each one knew that every session is very much important – when you miss, then it is your disadvantage – you miss a lot of things – P5*

*(Enrolling) is a commitment to the University – you can't just decide not to attend. This is a commitment, one that we were informed about from the onset – that you must know that you have a commitment – P8*

### **6.4.3 Community**

The community of any activity system comprises all those individuals within the system who are moving towards the same objective (Pather, 2012:255). In the education leadership learning activity system at the centre of this study, the community consisted of the collective of students who make up the various classes or year groups within the selected master's degree programme in educational leadership, i.e. the class of 2008, 2009 and 2010. Although not all the students in a specific class or year group participated in this study, the fact that they interacted with those who are participants makes them a part of the community for this system. This study sought to understand and describe that interaction and the inter-relationship between the subjects and the community and the manner in which the community contributed to the experiences and perceptions of the subjects of their own education leadership learning.

From the participants' responses to questions on the interaction between themselves as the subject of the activity system and the community of the system at large, the following themes emerged.

### 6.4.3.1 Interaction with Other Students Added Value to Learning

Most of the participants in this study placed great value on the contribution of their interaction with the community of the education leadership learning activity system to their experiences and perceptions of their own education leadership learning.

*Dit was vir my geweldig positief...ons het werklik goeie vriende geword...ons het rêrig na aan mekaar gegroei...ons was eintlik 'n kern groep wat van ons honeursjaar af gekom het...toe't ons nou nog ouens bygekry...so dit was baie positief*

translated as

*For me it was tremendously positive – we became really great friends – we really grew to be very close...we were actually a core group that carried over from the honours degree, and then we collected a number of other people...so it (the interaction) was very positive – P1*

Participant 15 spoke about the difference between master's degree programmes that include contact time and a modular component and those that do not – the greatest difference between the two being, in his opinion, the lack of interaction with a community within the activity system of the latter.

*Die hele idee dat ons moet klas toe kom, dink ek is baie sinvol...so die M wat gedoseer word is baie sinvol...ek dink jy stap waarskynlik met meer daaruit as wat jy sou as jy net die suiwer navorsings M doen, want miskien het jy nou hierdie moewise navorsingsprojek, maar jy mis al hierdie kontak met die ander mense en die ander perspektiewe. Die waarde van hierdie kwalifikasie vir my lê in die ervarings met ander wat ek gehad het en die 'networking' wat ek gehad het*

translated as

*The whole idea that you have to attend classes, I think is very sensible...I think the modular master's degree that is very sensible...I think you probably walk out of it with more than you would out of the purely research masters, because you might have this massive research project, but you miss out on all the interaction with other people and other perspectives. The value of this*

*qualification for me lies in the experiences that I had with others and the networking that I had – P15*

This is substantiated by Participant 8, when she says the following:

*When you are studying, if you are alone, you can become frustrated...you need others also to make sure that we share our cell numbers...it was like a network of some sort...to share our cell numbers, to e-mail each other to ask for things...even 'whatsapp' to say how far are you, what are you doing, have you started that assignment, can we meet in the library, so for me, those are the things that I value...we weren't just learners, we ended up being colleagues and friends, and we share and also advise each other on how to approach other stuff – P8*

The rest of the excerpts detail the participants' experiences and perceptions of the importance of the community within the education leadership learning activity system, and the contribution of that community to their own education leadership learning.

*Ons het dadelik 'n groep gestig...sommers natuurlik...dit was belangrik...as jy iets nie verstaan nie, dan bel jy - ons het nou-nog kontak...ek bel hulle so eenkeer elke ses maande...dit was 'n goeie ervaring, want onthou, as jy daar by jou skool is of by jou werk is, is jy die enigste een wat swot, en niemand anders het simpatie met jou nie, want hulle het nie 'n saak met jou nie – hulle wil net hulle pond vleis hê, en dan kan jy dié ou bel en dan kan jy by hom afpak, en dit help 'n ou baie...as daar iemand anders is wat saam met jou lei*

translated as

*We immediately started a group...naturally...it was important...if there's something you don't understand, then you phone – we still maintain contact...I phone them all once in six months – it was a good experience, because remember, at your school you may be the only one studying, and no-one else has sympathy with you or care about your studies, because all they want is their pound of flesh...and then it is important to be able to phone someone and to find someone who is suffering just as you are – P2*

*It (the interaction) was very interesting because we were sharing our fears, we were sharing our achievements, we were communicating when we were having challenges in writing assignments, assisting each other, and we were from a variety of fields – if you were at school, you were able to sit with a person who is maybe at a higher level, like a circuit manager - you are managing a school – he is managing schools, so even the discussions were very empowering and those levels were not that much important – we were able to relate and assist each other, so in that sense, knowledge and skills was shared between us – P5*

*For example when we are preparing the assignments, there will be times when we come and sit together and prepare. But there will be at least one or two where they will be communication...somebody phoned or on the internet, and when we come together for the research sessions, we also have an opportunity to come together...you know...to share with each other the challenges we are having with our studies, because in my case most of the students in my group dropped out of the programme – P6*

*The students in the programme were my family members...even now, we phone each other...some I even meet in the contact sessions when we are presenters...when I have an academic challenge, I contact them – P13*

#### **6.4.3.2 Interaction with the Community had an Impact on Education Leadership Learning**

In broad terms, the participants describe the impact of their interaction with the community of the education leadership learning activity system as two-fold – motivation and the giving and receiving of support.

##### **6.4.3.2.1 Motivation**

*Dit het gedien as motivering, ook omdat die studente almal positief was en wou presteer, het hulle 'n ou opgetel eerder as wat hulle jou...dit was nie 'n negatiewe klomp mense nie*

translated as

*It (the interaction) served as motivation, because the students were all positive and wanted to do well – this would pick you up rather than put you down...this was not a bunch of negative people – P1*

*I think the interaction was good, hence I said we used to have some study groups and we were able to motivate one another – P9*

*It was a positive impact in that I got support from the other students when I was having challenges – I had a shoulder to lean on – P5*

*You know...they (my fellow students) motivated me a lot...from my own area, when I go there, I found that I was alone, so I made friends with some of the students coming from Limpopo, though not far from me...they started to be my friends, we started to have influence with each other and encouraging each other to push forward – P10*

Participants 4 and 9 talked specifically about the contribution of the community to their experience of education leadership learning when they felt as if they had reached the end of the line, and were considering dropping out.

*Sometime because of other challenges, somebody indicates that they want to drop this thing (the programme), but through communication with other students, they decided to carry on, and then you see others continue even though they have some responsibilities, and that motivated me – P9*

*Op 'n stadium kom jy maar op 'n punt waar jy in hierdie moedelose ding is, van ek sien nie meer kans nie, veral ook toe ons begin met die fisiese skryf van die verhandeling - dan't jy't ondersteuning en onderskraging...aanmoediging ontvang en dieselfde anderkant toe ook*

Translated as

*At some stage you get to a point where you feel discouraged and you feel like you don't want to continue, especially once we had started writing up the dissertation...then you would receive support and encouragement and give it too – P4*

#### 6.4.3.2.2 Providing and receiving support

Participants spoke about support from two perspectives – both giving and receiving.

*Also I was able to assist others who requested for help – I could apply my knowledge at that particular time, because what I have learned...what I have mastered...would be different to what the other person has mastered – P5*

*To me, this group thing, it was helpful...like with the globalisation module...I was able to find a group that helped me, and I was able to pass...with that group that I had, I was able to understand and then pass that module...it is so important...that help that we get from others – P7*

*Ek dink ons het 'n redelike ondersteuningsrol gehad...jy het ondersteuning ontvang en jy het dit gebied ook*

translated as

*I think we had quite a big supporting role... you received support and you offered it too - P4*

This quote from Participant 4 aptly summarises the findings on the interaction between the subjects of the education leadership learning activity system and the community of that system.

#### 6.4.4 Division of Labour

The division of labour within an activity system refers to “how the object of the activity relates to the community and refers to both the horizontal division of tasks between members and the vertical division of power and status” (Pather, 2012:255). The different roles and functions of all the participants in the selected master’s degree programme in educational leadership including the students as subjects and as members of the community (the horizontal division of labour) and the lecturers, study supervisors and administrative staff (vertical division of labour) constitute the element of the activity system entitled division of labour for this study (Scheckle, 2014:617). This study sought to understand and describe the interaction and inter-relationship between the subjects (master’s students) and the horizontal and vertical divisions of

labour as part of these students' experiences and perceptions of their own education leadership learning.

On the issue of which of the role players within the division of labour of the education leadership learning activity system (lecturers, fellow students, study groups, supervisors and administrators) played the most important part in the experiences and perception of the participants of their own education leadership learning, the following statement by Participant 13 sums up the issue admirably:

*In our language we say to choose is to hate – P4*

However true this may be, participants were asked to indicate which of the role players had, in their opinion, made the greatest contribution to their education leadership learning, and the interview data they provided indicates that the participants place these role players into two broad categories – those who played or fulfilled a supplementary role and those who played a primary role.

#### **6.4.4.1 Supplementary Roles**

##### **6.4.4.1.1 Administrative staff**

The participants described the role played by the administrative staff of the university as a supplementary one, and the data indicates that their experience of this role was overwhelmingly positive.

*Towards the last stages of completing the master's programme, there were a lot of times when I was interacting with them (the Administrators) regarding the list of documents that I needed to submit, and they would explain to me what was required of me...they were very much helpful to us...they treated us with respect...like they would give you the feeling that you are a senior student – P6*

*Weet jy, hulle was baie behulpsaam gewees...die mense met wie ek te doen gekry het, het my altyd baie hoflik behandel...en het nie my tyd gemors nie,*

*want ek was altyd haastig, want ek moes wie weet hoe laat hier ry...hulle was altyd beskikbaar vir my gewees*

translated as

*You know, they were very helpful...the persons I dealt with, always treated me courteously, and did not waste my time, because I was always in a hurry – I had to leave here (a town approximately 100km from the University) at who knows what time – they were always available to help me – P14*

#### 6.4.4.1.2 Study groups

Although many of the participants reported that they had worked together with fellow students at various times during the programme, these collaborations were never formal or a programme requirement. However, all the participants report that, when they worked together in informal groups or settings, these interactions would add value to their experience and perception of their own education leadership learning.

*We had study groups...we had informal groups...we didn't get to meet that often, but we did have study groups that was very beneficial – P12*

*We would discuss about an assignment that was giving us problems, we would sit down and guide each other, and then we would disperse so that everyone can go and write his or her own stuff at home - I found this very much valuable – P11*

#### 6.4.4.2 Primary Roles

##### 6.4.4.2.1 Fellow students

From the interview data it is clear that a small majority of the participants believe that their fellow students made the greatest contribution to their experience of their own education leadership learning.

*My fellow students...you know...I had a very positive relationship with them, just in terms of things like saying I am done with my own assignment, even though it is far distant...he would encourage you...do the same with that, you see...they brought a spirit of a sort of competition to say if he has done it, I can*

*do it. So we moved along that spirit of saying that all of us, we could do this – P10*

*The role that they played is that I gained much information from them...they were a resource to me...so I got much information that really helped me – P9*

*Outside campus I only had one guy...he stays about 60km from here, and we would time and again meet in order to define what we have to do...you know, my ethic clearance, I don't know what to do...and we would discuss how to do it, or whatever...I would even call him...it helped us a lot with that – P10*

*The colleague that I worked with had the greatest impact – she is the one who inspired me, she is young, she is a hard worker, she reads, we share – P8*

#### 6.4.4.2.2 Lecturers

Although a small majority believe that their fellow students made the greatest contribution to their education leadership learning experience, a number of participants rated the role of the lecturers as having made the greatest contribution.

*As ek moes sê sou ek sê die dosente...op die ou einde was die dosente die belangrikste vir my, want dit was maar die ouens wat die goed aangebied het en vir ons die goed onsluit het en moeite gedoen het*

translated as

*If I have to say then I will say the lecturers, in the end it was the lecturers who were the most important for me, because they were the ones who presented the stuff and unlocked the stuff for us and went to all that trouble to do so – P2*

*Ek dink die dosente het 'n ou redelik gemotiveer...um...hulle het nie net die klas gegee nie, hulle het ook so bietjie met jou as méns gewerk, en dalk jou so 'n bietjie geïnspireer tot nuwe dinge en om bietjie te kyk na nuwe perspektiewe en sulke tipe van goed*

translated as

*I think the lecturers were the ones who motivated us...they didn't just present the lectures, they also worked with you as a person, and maybe they inspired you to new heights and to look at new things and new perspectives – P4*

*Even the lecturers, they treated us with a lot of respect...even though we are no longer their students, the kind of relationships we are having...in the sense that if I am experiencing some challenges regarding something that we once shared in the lecture, I could always call and ask, or maybe write an e-mail – P6*

*You know, they impart their own knowledge, and they will bring something that is not even in the modules or in the books - their own experience...they help us a lot in terms of what we are doing at our own schools and stuff like that, and therefore it was very positive, and we learned a lot – P10*

Significantly, two of the participants mentioned the mentoring role that they felt the lecturers had played.

*Ek het hulle as méér as dosente, veral sekere, ervaar. Oor die algemeen was dit baie positief - hulle was nie net dosente nie, hulle was amper basies 'n mentor gewees*

translated as

*I experienced them as more than just lecturers, especially some of them. Generally they were very positive – they weren't just lecturers, they were basically mentors - P1*

*Hulle was mentors...almal van hulle...almal het 'n rol gespeel...tot vandag toe, ek was regtig...bevoorreg om met daai mense toe doen te kon gehad het*

translated as

*They were mentors...all of them...all of them played a role...even today still...I was very privileged to have had those people – P14*

#### 6.4.4.2.3 Supervisors

The master's degree programme in education leadership selected for this study includes as part of its requirements for the awarding of the degree, the completion of a research project and the submission of a dissertation of limited scope. All students of the programme are assigned a supervisor for the purposes of this research study. The data reveals mixed reactions to the issue of the role of these supervisors in the participants' experience of their education leadership learning. While some participants experienced their interaction with their supervisor as positive, a number of the participants expressed disappointment in the role this functionary played in their education leadership learning experience. Those participants who experienced their interaction with their supervisors as a positive part of their education leadership learning experience, describe the interaction as encouraging, supportive and developmental, and their supervisors as knowledgeable and interested.

*Behalwe dat hy die kennis gehad het...die manier waarop hy 'n mens begelei het was absoluut met empatie, simpatie, deernis*

translated as

*Over and above the knowledge he had, the manner in which he supervised me spoke of empathy, sympathy and kindness – P1*

*I used to submit and then he would return my work with comments...although at times you would tell yourself that...this is at my level best, but the comment that would come...but after you have changed what he has said, you will see your work improving drastically...so they were there for the reasons...to assist to improve our work...ja – P5*

*I think he played a very positive role in the sense that ...when I first met him, he explained...although I didn't understand at first...I wanted to say...you know...give me the exact theoretical framework...and he was like I am not going to be able to give you that...I want you to be able to go and read through the literature and then find out something, because if I spoon-feed you, you will not be able to know what you are doing, and at first I didn't like*

*that attitude, but later I liked it in the sense that I could now understand every route that he took - P6*

*My supervisor was excellent...supportive and motivating, because there were certain things that I did not know, but through my interaction with her, I learned a lot – P9*

On the other hand, those participants who experienced their interaction with their supervisors as a negative part of their education leadership learning experience, identify factors such as the lack of meaningful and / or timeous feedback and a failure to maintain regular contact and also inconsistency as reasons for their negative perceptions of the relationship.

*Ek het partykeer die gevoel gehad van die vorige keer wat ek met hom gepraat het toe nou het hy vergeet waarmee ek besig is, en dan begin ek weer voor, of dan verander hy sy idees*

translated as

*I sometimes had the feeling that he would forget from one time to the next what I was busy with, and then I start all over again, or he changes his ideas – P15*

*I must indicate with research there was a time when it was very much odd...where one felt that one was unnecessarily prejudiced...like my supervisor would say change this to this...you do that...and when he sees you again, he say change that back to what you have done before...that thing is very frustrating – P13*

*I wasn't very happy and I am still not very happy with my supervisor... not from my side I am supposed to be the one who makes the contact...I sent an e-mail to my supervisor...it was last year...I sent that same e-mail twice, and I haven't received (4 months later) a reply from her as yet – P12*

*I was with a supervisor where we couldn't actually, you know...meet or agree on some of the issues, but later the supervisor was changed, and I enjoyed the programme and I completed it – P10*

*He will say to me email those things and I will wait for two weeks for his response and after two weeks I'll call and he will say I am still busy, I have not yet checked it...you know... I will send another chapter...you will keep on sending, but you don't get that feedback – P7*

This brings to a conclusion the presentation of the findings for research sub-question 1.

## **6.5 Findings – Research Sub-Question 2**

The second of the three (3) sub-questions designed to illuminate the primary research question was:

“Which aspects of the master’s degree programme in educational leadership do master’s students perceive as barriers or challenges to their own education leadership learning?”

### **6.5.1 Tools and Artefacts**

As mentioned earlier in this chapter, the tools and artefacts element of the education leadership learning activity system includes (a) the learning content of the modules, (b) the learning materials that supported that content, (c) the teaching and learning strategies employed to present these modules, (d) the assessment strategies employed in the modules and (e) the use of ICTs during the programme. The section that follows will present the themes that emerged from the interview data related to the *barriers* or *challenges* to the experiences and perceptions of their own education leadership learning as identified by the participants.

### 6.5.1.1 Lack of Consideration for Individual Pre-knowledge and Experience

The most frequently mentioned barrier to the positive experience and perception of their own education leadership learning was the issue of the lack of consideration shown to the students' different levels of pre-knowledge and leadership experience.

*En dis goeters waaroor ek lankal nagedink het, en ek het goeie idees daaroor en ek het dit al getoets, so ek sit in 'n posisie waar ek eintlik kan reflekteer oor wat ek reeds weet, en wat hy besig is om die ouens te leer wat nou nuwe hoofde is en adjunk hoofde...so ons het eintlik nie op dieselfde vlakke gesit nie*

translated as

*And these are things (concepts) that I have been thinking about for a long time, and I have good ideas about them and I have tested those ideas in practice, so I am in a position where I can reflect on what I already know, and what he (the lecturer) is doing is to teach the guys who are new principals and deputy principals...so we weren't really on the same level – P15*

Participant 1 talked specifically about the matter of pre-knowledge and the fact that his pre-knowledge dampened the impact of the module for him.

*Omdat ek, soos ek reeds gesê het, bepaalde voorkennis gehad, en ook omdat ons departementele inligting kry, was die impak wat dit op my gehad het...dit was nie so 'wow' nie*

translated as

*Because, as I mentioned before, I had certain pre-knowledge, and because we receive information from the department (of education), the impact that it (the module) had on me was not that 'wow' – P1*

In the same vein, Participant 2 reported that he disliked the module on leadership because of the repetition of content that he has already mastered elsewhere.

*Ek dink die rede hoekom ek niks daarvan gehou het nie is omdat ek voor dit al twee kursusse gehad het - ek het 'n ACE gehad en ek het Matthew Goniwe se 'School Leadership' gedoen, so ek was moeg vir al hierdie 'leadership theories' en 'management' goed, so dit het nie werklik vir my iets beteken nie*

translated as

*I think the reason why I didn't like it (the module on leadership) is because before this (the master's programme) I had completed an ACE (Advance Certificate in Education) and I had done Matthew Goniwe's School Leadership, so I was tired of all the leadership theories and management stuff, so it did not really benefit me that much – P2*

This is further substantiated by his next statement:

*Dit was nie een van my gunsteling modules gewees nie...die goed wat ons daar geleer het het ek klaar geweet, in daai sin, so dit was nie vir my interessant nie, dit was nie vir my nuut nie*

translated as

*It (the leadership module) was not one of my favourites...the stuff we learned there I knew already, so I did not find it interesting - it wasn't new to me – P2*

#### **6.5.1.2 Some Modules not Directly Applicable to Education Leadership Learning**

The participants' second most frequently mentioned barrier to their experience and perception of their own education leadership learning was the matter of modules in the course-work section of the programme that they felt were not directly related to education leadership learning. As discussed in Chapter 2, the selected master's degree programme in educational leadership included a coursework component made up of six (6) modules containing content related to various education leadership themes (leading the process of learning in education, leading and managing both human and financial resources in education and aspects of education law) and also research themes (the methodology of research in education and the nature and impact of globalisation on education). The latter two modules are singled

out by a number of participants as barriers to their own education leadership learning, as indicated by the excerpts below.

*Kyk, die modules wat spesifiek met onderwysleierskap te doen gehad het was almal vir my baie sinvol - die goed wat amper vir my meer van 'n irritasie was was die navorsingsmodule en die...globalisering...ek weet dit is nodig, né...om dit te doen...dit skep weer vir jou 'n ander agtergrond...maar dit het nie rêrig vir my so 'n groot bydrae gemaak aan my poel van kennis nie*

translated as

*Look, the modules that dealt specifically with leadership were all very meaningful to me – the stuff that was almost more of an irritation was the research module and the...globalisation...I know it is necessary to do them...it created a different background...but it didn't make that big of a contribution to my own pool of knowledge – P14*

*I still don't see the relevance of it for us now, especially...even as part of the programme - it's just for me...it didn't strike a chord for me...it was something which I just had to do...it had to be done – P12*

Of the two non-leadership related modules, participants singled out the one focusing on globalisation in education for particular criticism.

*Ja, 'globalisation'...dit was vir my 'n mors van tyd gewees...dit was nie regtig vir my 'n vak waarby ek enigstens baat gevind het nie, behalwe dat ek 'n hele klomp terminologie moes gaan byleer het*

translated as

*Yes, globalisation...I felt it was a waste of time...it wasn't really a module that I gained from, except for the fact that I had to learn a whole bunch of new terminology – P4*

*I have to mention the globalisation one again – it was a little bit abstract – I wish it could be linked to more closely to leadership in terms of how as leaders it affects us. You know...let us not take it how it happened in other countries,*

*let us come closer to our own environment...I think that was the only thing that was missing – P8*

*I would say globalisation...(laughs)...it wasn't relevant for the South African context, especially if you look at the background of some of the teachers...or some of the people...some of the students at the time – P12*

#### **6.5.1.3 Late or absent feedback**

The participants' third most frequently mentioned barrier to their own education leadership learning was late and sometimes even absent feedback on the work they had produced during the modular section of the programme.

*Ek meen ons het al in die eksamen lokaal gesit, toe het ons nog nie ons werksopdragte teruggekry nie*

translated as

*I mean, we were sitting in the exam room, and we had still not received feedback on our assignments – P4*

*What also killed was not to get feedback – we weren't receiving our assignments that we had written and submitted to the lecturer...we got them only when we were about to write exams, so this is not motivating...not encouraging – P8*

*You discover those assignments just thrown there (on a table outside the lecturer's office), and you don't get any engagement, and you get the mark...I still remember the mark...and I wanted to ask this person how did you come to this mark – there are no comments, just a mark...no comments – P8*

#### **6.5.1.4 Insufficient Contact Time**

A number of the participants commented on the time allocated for *contact*, i.e. lectures, with the general feeling being that the lack of sufficient contact time acted as a barrier to their experience and perception of their own education leadership learning.

*I am not sure if the time for contact was enough...because they (the lecturers) were supposed to do a lot in limited time. I would extent time a little bit for contact...more sessions...just add more sessions – P5*

*The time frame regarding the issue of how many times do we go and attend, because I was doing the modular course, the amount of time we got with the lecturers was...for me it was too little – P6*

#### **6.5.1.5 The Amount of Work and Number of Assessments**

Related to the issue of contact time, the amount of work involved in completing the six (6) modules also drew comment from some participants, most notably from Participant 8.

*The only thing that I can say is that it is a lot of work, because you might discover for one module there are four assignments...in one module...I feel that that is a lot, especially for people who are part-time...who are teachers, who are school principals...I think if the assignments...the work-load can be reduced, but not the content...but it is only the work load...the number of assignments...because I remember one module we had four assignments, and the first module that we did, so a lot of people they had to...they dropped out because of the pressure...the work pressure – P8*

#### **6.5.1.6 Instructional Applications / Teaching and Learning Strategies**

##### **6.5.1.6.1 Lack of differentiation**

Although not strictly limited to instructional applications or teaching and learning strategies, as can be seen from the participants' comments in section 5.1.1 regarding the programme's lack of consideration for individual pre-knowledge and experience, the matter of differentiating between the different levels of experience and knowledge has, in the opinion of a number of participants, an important influence on the manner in which the modules are presented, and thus on their experience and perception of their education leadership learning.

*As jy sit met 'n klomp mense wat ervare skoolhoofde is, dan gaan jy klas aanbied op 'n ander vlak as wanneer jy sit met mense wat jy kan sien 'actually' baie onervare is en nog nie op daai hoë vlak kan dink nie, en dan is jy dus eintlik verplig om die 'level' waarop jy die lesing aanbied af te bring...so jou taalgebruik en verduideliking is aansienlik anders, né? Dit word 'significantly' laer...en nou sit jy met hierdie wye spektrum van mense voor jou, en net om sinvol te kan praat...dit help nie jy praat op die vlak van die ou wat heel hoogste is nie, want die ou wat heel onder is – jy gaan hom mis...nou gaan ons die heel laagste doen, en nou frustreer jy die ouens wat bo sit*

translated as

*If you have a bunch of experienced principals, then you teach in a different way that you would if you sat with people who you could actually see are very inexperienced and are not yet able to think at a high level, and so you are basically forced to bring down the level at which you teach – your language level and the level of your explanations changes significantly, not so? It (the level at which you teach) becomes significantly lower...and now you have a wide spectrum of people in front of you, and in order to be able to make sense...it doesn't help to pitch your teaching at the level of the guys who are at the top, because the guy at the bottom...you are going to miss him...so we do the lowest, and you frustrate the guys at the top – P15*

When asked to explain how this situation can be addressed, the following suggestions were made:

*Dis 'n baie moeilike vraag daai...jy sal moontlik méér as een stroom kan hê, en die stroom van ouens wat reeds op 'n redelike hoë vlak is, kan jy miskien nie so lank laat duur nie...korter*

translated as

*That is a difficult question...you might possibly have more than one stream, and the stream with the guys on the higher level might not take as long...might be shorter – P14*

*Jy kan dit dalk net beter aanbied...of is dit dalk moontlik om die ouens in verskillende groepe te sit...ek het idees hoe ek iets anderste sou gedoen het*

translated as

*Maybe you can just present better...or it might be possible to put the guys in different groups – I have some ideas on how this can be done - P4*

#### 6.5.1.6.2 Insufficient time for interaction and collaboration

The issue of insufficient contact time discussed in the previous section is closely linked to the participants' concern that, as an instructional application or teaching and learning strategy, collaboration and interaction was not utilised effectively.

*Ek dink 'n mens moes dalk méér interaksie gehad het - ek besef wat is die rede daarvoor – maar meer interaksie, tussen studente onderling en tussen die student en die aanbieder, sodat daar basies 'n drie-rigting interaksie is*

translated as

*I think we should maybe have had more interaction – I realise the reason for it (not having more) – but more interaction, among students and between students and the lecturers, so that one basically has three-way interaction – P1*

#### 6.5.1.6.3 Lack of variety in instructional applications

Some participants also mentioned the fact that a wider variety of instructional applications or teaching and learning strategies might also have been employed in order to improve the students' experience and perception of their own education leadership learning, as is clear from the following excerpt.

*Others were doing...this thing of inviting other professors maybe from another universities, for example if you start from A to B in this chapter, don't do it alone...you must get other people, other opinions because other experienced people in the field, they must come...maybe be invited, but it was only in some modules, not in others. So you will not...every Saturday, be listing to this same person with the same approach – P8*

#### 6.5.1.6.4 Ineffective use of the ‘flipped classroom’ concept

The inverted or *flipped* classroom entails a classroom where “events that have traditionally taken place inside the classroom now take place outside the classroom and *vice versa*” (Lage, Platt and Treglia, (2010:32). Participant 15 comments on the fact that, in his opinion, this concept was not used effectively during the course work section of the programme, as can be seen from his comment below:

*Moenie vir die ouens sê om die goed te lees, en sê dit gaan dan as gelese beskou word, en dit dan kom behandel nie – moenie dit doen nie – dan moet jy liever vir my sê luister, ons gaan die goed in die klas behandel*

translated as

*Don't tell the guys to read something and tell them that it will be considered read, and then come and present it – don't do that – then you should rather say to me listen, we are going to discuss this stuff in class – P15*

#### 6.5.1.6.5 Insufficient practical application

Despite the earlier finding that the participants felt that the theory learned during the modular section of the programme could be applied to practice (4.1.1.4d), some participants felt that, as an instructional application or teaching and learning strategy, greater focus on and attention to making the theory of leadership practical would have contributed positively to their experience and perception of their own education leadership learning, as is evident from the following excerpt.

*Making it more practical...um...things like the human resources management – you are working with staff, so maybe have something practical like an exercise that can be done in something like...say discussing teacher's job descriptions with them – P12*

### **6.5.1.7 Assessment**

#### 6.5.1.7.1 Portfolios of evidence as a barrier

Although a number of participants reported that the use of portfolios of evidence as a means of assessment enhanced their experience and perception of their own

education leadership learning (see section 4.1.4 above), some participants reported that this method of assessment was a barrier to their education leadership learning.

*Ek was nie gelukkig met daai 'portfolio' ding nie... wat jy moet doen is basies net weer al jou goed bymekaar sit en ingee*

translated as

*I was not happy with that portfolio thing – what you basically have to do is just put all that you have done together and submit it - P2*

*Die portefeulje goed wat ons moes ingee, het my nie baie aangestaan nie, ...kyk, van die ander werksopdragte wat 'n spesifieke rubriek het, het jy geweet waarna jy gaan kyk, en kyk, dis moeilik...daar kan nie 'n spesifieke memo wees nie omdat jy oor verskillende onderwerpe en goed gaan skryf nie, maar die portefeulje ding was vir ons baie duister, want hoe gaan jy bewys wat het jy geleer het?*

translated as

*Those portfolio things that we had to submit, was not my favourite – look, with some of the other assignments that had a specific rubric, you knew what you had to go and look at, and look, it was difficult...there was no specific memorandum because you were writing on different topics, but the portfolio was a mystery, because how are you going to prove what you have learned? - P4*

#### 6.5.1.7.2 Open book assessment

Another assessment strategy that elicited comment was the *open book* examination prescribed by one of the modules.

*The only thing I didn't like about this module...it's a personal feeling...you know...for me the 'open book'...that's where it punished me, and as a result, I didn't get the mark that I thought I deserved in that particular module, because to me this thing of 'open book'...it takes a lot of time...you open...you...although you have read a lot of things, you have to refer to these*

*books that are in front of you...so to me, that 'open book' exam...it took a lot of time, and as a result I couldn't finish – P6*

### **6.5.1.8 The Use of ICTs**

#### **6.5.1.8.1 Lack of computer literacy at the beginning of the programme**

The primary barrier related to the use of ICTs experienced and perceived by participants as a barrier to their own education leadership learning was a lack of computer skills and literacy at the beginning of their enrolment in the programme.

*(Laughs)...hey, that one...it gave me a lot of problems...when I was doing the modules, it was during...I was from a school, and from a school we were not able to use the internet and so on...the laptops...I didn't have that...so when I did these modules, I didn't have...computer skills, so for me, I was not using the internet altogether. Yes...I could not access many things, because I didn't have those skills to use...you know, the library. No, hence I was telling you that while I was doing my masters, I was like...blind...yes, I was blank...I think the internet contributed to that – P7*

*Initially...it was very tough...I could not use a computer...I am not even talking about a laptop...I did not even have a laptop...I did not even know how to use the internet...I did not even have an e-mail...it was tough...you know, I used my friend's email...the university would sent the email to my friend, and I would access it through my friend...it was a tedious way...but there came a time when I said to myself, I must learn quickly – P13*

*Ok, let's start with the e-mail...as I have indicated before, I was born before technology, and I am not good with computers, even now...so I was struggling to retrieve e-mails from the University...I set up an e-mail address before I started, because that is one of the prerequisites of the University...you have to have an e-mail address...so I had an e-mail address, but to retrieve the information for that address...it is very difficult for me, because even though I have a computer at home, I cannot access the information myself... so when we were in the library, we would ask these youngsters to do things for us, and*

*they were happy to help me...a lot. Most of them are students, so when they help us, we would give them money...R50 or R30 to buy lunch – P11*

Some participants, although computer literate themselves, questioned the ability of students who were not computer literate to cope with the demands of the programme.

*The only thing that I would mention saying is that it needs to be mentioned in the admission requirements the students should be computer literate, because I don't know how other students managed to do that – I saw some students dropping out because of that...they were very frustrated when we were busy researching in the library and during those library sessions – they can't cope, because people would say yes, I am computer literate, but then someone is not...even if there should be a practical thing...ja...practical – you can see that this student can type – P8*

*Ja, fortunately I was computer literate, and the training provided by the library of how to search...ja, it was not...it was really not frustrating me, and if I was not computer literate, I don't think I could have achieved to the level I have achieved – P5*

*I think that...you know...because I had many courses that were provided by the Department of Education before I got into this programme, I made it a little bit easier for me – P6*

### **6.5.2 Rules**

The interview data revealed that the participants experienced no significant barriers to the experience and perception of their education leadership learning from the rules of the education leadership learning activity system. Generally the rules and their application was experienced in a very positive manner, with only a positive contribution to the education leadership learning and education leadership of the participants to be seen, as reported in section 4.2 above.

### 6.5.3 Community

#### 6.5.3.1 Distances between Students Prevented Collaboration

The only barrier related to the community element of the education leadership learning activity system reported by the participants relates to the issue of the distances some students had to travel in order to participate in the programme, and the negative effect of this on their ability to collaborate with others and to give to support to and receive support from others.

*Also, the disadvantage for most of the students is that they are coming from far - most of the students come from as far as Limpopo and they have to travel and go in one car from those rural areas...and then when they come to (the city), they do not have money to book to stay somewhere, and as a result we had an experience where students, even at exam time, they sleep in those parking areas...they go to the library and they sleep in their cars...they bring their blankets and then they sleep in the car and they study in the car – P8*

#### 6.5.4 Division of Labour

Although the reaction to the role of the supervisors in the division of labour within the education leadership learning activity system was mixed (see section 4.4.2.3 above), with some participants expressing reservations about their relationships with their supervisors, only a small number of those who did so, expressed the opinion that this relationship was a barrier to their education leadership learning.

*From what I have learned, you know, a lot of students that have dropped out, many are those who have been disadvantaged by their supervisors...I nearly became one of those, because for the past years, I was with a supervisor where we couldn't actually, you know...meet or agree on some of the issues, but later the supervisor was changed, and I enjoyed the programme and I completed it – P10*

*I think he was not pushing me...if I found someone who was very pushy and was just after me to say do this study, then I was going to finish...yes – P7*

*Ek het gewonder...die tipe interaksie wat ek kry, kry die ander ouens dieselfde interaksie...want as dit so is, dan gaan hulle swaarkry...ek het nie so verskriklik baie nodig gehad nie, want ek kon op my eie aangaan*

translated as

*I wondered...the type of interaction I get, do the other guys get the same interaction...because if they do, then they are going to suffer...I did not need so much interaction, because I could carry on on my own – P15*

This brings to a conclusion the presentation of the findings for research sub-question 2.

## **6.6 Findings – Research Sub-Question 3**

The final of the three (3) sub-questions designed to illuminate the primary research question was:

“What are the master’s students’ experiences and perceptions of the contribution of their own education leadership learning to their leadership practice?”

### **6.6.1 Tools and Artefacts - Module content and learning material**

As already mentioned, the tools and artefacts of an education leadership learning activity system are the education leadership modules, their content and structure, readers, study guides, lectures, PowerPoint presentations and all other learning material used during the presentation of these modules, as well as the assessments, modes of delivery (how the modules are presented) and the use of ICTs by both the students and the members of the activity system community (fellow students, lecturers, supervisors and administrators) involved in the programme (Scheckle, 2014:611). The section that follows will present the themes that emerged from the interview data related to these tools and artefacts and the participants’ experiences and perceptions of their impact on their own education leadership learning and on their education leadership practice.

### 6.6.1.1 Modules that made Greatest Contribution to Leadership Practice

A significant number of the participants reported that the education law module had greatly contributed to their leadership practice. General terms used to describe this module are protection, empowerment, discipline (educators and learners), guidance and practical value, freedom from fear. The following excerpts clarify the impact that the participants reported.

*Ek het definitief gesê onderwys reg, juis omdat dit jou help om jou...jy kan basies jou skool beskerm, om die regte dinge te doen maar ook om nie geboelie te word nie, so dit het vir my uitgestaan*

translated as

*I definitely said education law, simply because it helps you to ...you can basically protect your school, to do the right thing but also to not be bullied, so that stood out for me – P1*

This statement by Participant 1 is substantiated by Participants 5, 6 and 12.

*Educational law...for the purpose of being able to manage the school properly, to be able to play your role effectively as a principal, because if you are weak on that side, the unions just take over, and you can't have control over everything taking place at the school – P5*

*I think the OWR one...the law one, because ...you know...we are dealing with a lot of cases every day in our school situations, especially at management level...educators...if I can give an example...in our case they are much more frustrated over issues of discipline with our learners...time and time again they would refer cases to us, and then, however we deal with those issues, we have to consider what the law is saying about those issues – P6*

*I think it definitely was the education law, and to a lesser extent the accounting and financial management, but the education law really struck a chord with me and it is something that I can implement every day, and I can give educators guidance – P12*

Another module rated highly by the participants for its contribution to their leadership practice was the one that dealt with managing and leading human resources in education, and specifically that module's focus on staff and professional development.

*I learned that you cannot expect a person to deliver if that person is not developed, and if a person is new, sometimes the new teachers are just dumped in our rural schools – no-one is taking care of them, so this is when I became exposed to all these professional development programmes like mentoring and coaching – these people they need to be mentored – the new teachers when they come to us, and there should be people, especially the experienced ones, who can transfer knowledge. We always hide, saying it is the role of the government to develop and empower teachers, and not that of the school leaders, so those two modules for me – the LBO and the LBL – they were talking to the leaders, directly to the leaders on the issues of leadership – P8*

### **6.6.2 Tools and Artefacts - Contribution to leadership practice**

When it came to reporting specific contributions that the selected master's degree programme in educational leadership has made to their education leadership practice, the following excerpt from the interview with Participant 13 opens the conversation very aptly:

*I must say this programme has overhauled my practices...it renewed me, because I was managing...I was a deputy principal of a school without knowledge of recent or contemporary policies and issues, but this programme cleaned me and it gave me the relevant stuff – P13*

The specific contributions that the participants reported can be merged into a number of themes – these will be discussed in the sections that follow.

### 6.6.2.1 Self-confidence as a Leader

Participants felt that their participation in the programme boosted their confidence as education leaders.

*Dit het my absoluut bemagtig en ook baie méér selfvertroue gegee, so ek voel ek het baie 'skills' bygeleer, en 'n ou kan dit met selfversekertheid toepas*

translated as

*It absolutely empowered me and also gave me more self-confidence, so I feel like I learned a lot of new skills, and I can apply these with confidence – P1*

*Jong, ek sien 'n M as 'n heeltemal 'n 'life-changing' ding, jy weet...die manier hoe jy...jy's ander daarna, jy is nie meer dieselfde nie...sekere van die modules kon ek dadelik gebruik, voor ek nog 'n graad gehad het ouens kom na jou toe en vra...ek wil nie sê status nie, maar ouens kom vra jou vrae*

translated as

*Man, I see an M (degree) as a completely life-changing thing...the way you are...you're different afterwards, you are no longer the same...some of the modules I could use immediately, long before I had the degree, guys would come and ask...I don't want to say status, but guys came to ask you questions – P2*

*Nee, ek dink jy sien dinge in 'n beter perspektief...um...jy kan met meer outoriteit en met selfvertroue dinge aanpak, en met meer outoriteit besluite neem, omdat jy die kennis het...en jy voel meer bemagtig – jy tree met groter selfvertroue op*

translated as

*No, I think you see things from a better perspective...um...you can tackle things with more authority and self-confidence, and make decisions with more authority, because you have the knowledge...and you have more empowered...you act with greater self-confidence – P4*

*I think now...even the staff members I am working with, they have greater respect for me and they value my contributions a lot, in the sense that I*

*would...if I were to give an example, like, every time there's a situation...an emergency situation or whatever, the principal would just call me and he would go to the extent of saying because you have learned this and this, I am thinking I should maybe get advice from you in terms of how we can do this, and then later we can call everybody and we can interact with them. So, somehow...you know...it has given me a lot of confidence and greater respect with my peers and my colleagues – P6*

*This programme, it put me at a level where know I am not scared to lead, I am not scared to face any challenge, I have learned that as a leader I have to be strategic and come with a solution, and also know that I must make a difference in everything that I do. I have become conscience of that, that there are people who are looking at you as a leader, and you have a responsibility to those people in the way you behave and you conduct yourself and the way you do your work, because you have the responsibility – P8*

*You know, the whole programme, as I am saying, it influenced the way...number 1, like you know, as you present whatever you have, you start to have confidence in yourself and you prepare thoroughly, and verifying whether what I am going to utter is really...you know...adequate...is really good...then you will not say something just from your own mind...hence it makes you to believe much in yourself, you see – P10*

### **6.6.2.2 Empowered to Empower Others**

Many of the participants reported that they experienced an empowerment during their participation in the programme which in turn allowed them to empower those who they lead.

*Dit het my ook gehelp om my personeel te bemagtig...want 'n ou deel maar hierdie goed met die personeel, veral as ek kyk na skool veiligheid en skool dissipline...maar veral met skool veiligheid, het ek 'n baie ernstige gesprek met die personeel gehad.*

translated as

*It also helped me to empower my staff...because you share these things with your staff, especially if I look at school safety and school discipline...but especially with school safety, I had a very serious conversation with my staff –*

*P1*

*I think these three (modules – law, human resource management and leadership) are most applicable to the school situation, because you need to develop the staff members...not developing them may be putting them into problems – P5*

*From that programme I focus on leadership – those people have to be empowered first, because they won't be able to manage and empower the others if they themselves...if they are not empowered – P8*

*The module actually helped us in terms of...um...especially in terms of disciplining learners at school...you know, though we understood from the start that...um...corporal punishment is abolished, but up until one came across this module, it was not much there...um...in the mind...one used to...sometimes...you would find yourself deviated from that, having done punishment that is not actually wanted, but this module of education law, you know, it helped me to understand definitely, how serious is it, you see, and also bring up some of the sorts of punishment that people can use rather than the old ones that people were used to during my own school times, and I found this...you know...knowledge imparted to us...very important – P10*

*We had some mini-workshops with the staff members, once we realised that we were having problems in terms of disciplining the learners, so it made a positive contribution in the sense that I shared with them what I have learned – using ...you know...the same legislation that were there before, but maybe they were not aware of how to use this – P6*

*It really changed the way I used to do things, because it was focusing on the main issues that managers have to look at at school – empowering you to*

*ensure there is discipline, that the curriculum is managed, that you develop the staff members, so overall it was really assisting in the school situation – P5*

### **6.6.2.3 Insight into/Exposure to the Leadership Perspectives of Others**

Many of the participants commented on the fact that they valued the learning they did about others in the system, and that they experienced the insight into and exposure to the large variety of leadership perspectives represented in their cohort as positive.

*Dit was 'n ryk ervaring gewees omdat dit my blootstelling gegee het aan ander skoolhoofde in 'n baie groot verskeidenheid van tipe skole reg deur van plaas skole...inner-city schools'...daar was baie min privaat skool mense daar gewees...maar 'model C skole'...so 'n ou het nogal redelik die spektrum gesien, en dit was vir my, van die hele kursus, was dit vir my omtrent die heel belangrikste – P15*

translated as

*It was a rich experience because it me exposure to other school principals in a large variety of different types of schools, right through from farm schools...inner city schools...there weren't many private schools...but 'model C schools' (schools formerly reserved for white children only)...a person got to see the whole spectrum, and that, for me, was about the most important aspect of the whole programme – P15*

Participant 14 also found this aspect of the programme interesting, and he describes the experience as eye-opening.

*Wat vir my wel interresant was, was die perspektiewe van ander studente wat hoofde was of adjunkhoofde was by 'township' skole en op die platteland - dit het my beter insig gegee oor hulle verwagtinge en oor hulle frustrasies en behoeftes, en hoe skooltipes verskil – dit was vir my 'n 'eye-opener' gewees, want 'n ou het nooit regtig blootstelling aan daai skooltipes gehad voor jy nie met daai ouens te doen gekry het nie*

translated as

*What really interested me was the perspectives of the other students who were principals and deputy principals at township schools and in the rural areas – it gave me a better understanding of their expectations and of their frustrations and needs, and on how school types differ – it was an eye-opener for me – P14*

He also appreciated the experience of being exposed to learning about dysfunctional schools.

*Dit het vir my 'n ander insig gegee spesifiek oor hoe dit in disfunksionele skole gaan – wat kan verkeerd loop by 'n skool en hoe maklik dit kan verkeerd loop, en hoe om dit te stop*

translated as

*It gave me a different perspective specifically on what it is like in a dysfunctional school – what can go wrong at a school and how easily it can go wrong, and how to stop it from going wrong – P14*

Participant 4 spoke of the changes to his perspectives on education leadership that he experienced at the hand of the learning content.

*Ja, verseker het dit verander, want skielik het ek ander ouens se uitdagings begin sien en begin verstaan...um...'n ding wat vir my as normaal voorgekom het, is vir hierdie ou iets uit 'n ander wêreld gewees...dit het nogal vir 'n ou deure oopgemaak dat jy met ander oë kyk na kollegas se uitdagings, want hulle uitdagings is anders*

translated as

*Yes, it (my perspective) definitely changed, because suddenly I began seeing and understanding the other guys' challenges...um...something that appears normal to me might be something from another world for someone else...it also opened doors so that you could look at your colleagues' challenges differently, because their challenges are different – P4*

He continues in the same vein when he states the following:

*Ja, jy begin...ek dink...rêgtig met ander oë kyk, ander maniere van hoe sou ek dit bestuur het...um...’n simpel voorbeeld is as mens nou gaan vat – ons het een soort unie wat by ons verteenwoordig is...en hier sit ’n ander ou en hy het vyf verskillende soorte unies, so hoe hanteer jy dit? Van die mede-studente het daai ding ervaar...so dit het vir ons ander deure oopgemaak...jy’t jou visie verbreed*

translated as

*Yes, you start...I think...really looking at things from a different perspective...different ways in which you would have managed something...to give a simple example...we have one union represented in our school...and here is someone else who has five different unions represented at is school, so how do you manage that? Some of my fellow students have experienced that...and that opened other doors for us...you had to widen your vision – P4*

#### 6.2.4 Empowered to be able to offer leadership advice at various levels

A further aspect of the empowerment experienced and perceived by the participants as part of their own education leadership learning is that of being empowered to offer advice to others on a number of topics, specifically with regard to the law and the legal side of education.

*Ek kan byvoorbeeld aan een baie goeie voorbeeld dink...dit was beheerliggaamslede wat bedank het – ouer lede, en daar moet mos meer ouer lede wees as personeel...toe bedank daar drie ouer lede...toe word daar drie ge-koöpteer, wat jy mag doen, en interessant is, daai drie lede het stemreg, al is hulle gekoöpteer...daai ouens is vir die tussentyd daar, en hulle mag stem, en ek meen, die ouens het nie geweet nie...ek kon nou dadelik sê nee, julle mag maar stem, gaan lees maar daar en daar...*

translated as

*I can think of one very good example...it was about school governing body members who resigned – parent members, and there has to be more parent members on the school governing body than staff, so three new members*

*were co-opted, and what was interesting was that they could vote, even though they were co-opted...those guys (the new members) are only there in the meantime, and therefore they can vote, and I mean, the parent members did not know that...I could immediately say no, you may vote, go and read there and there (in the law)... – P2*

*I make the educators and the principals aware that, according to the law, it is not supposed to be done like this, you know...you are able to help them, to assist them, to be careful in whatever that they are doing – P7*

*I feel empowered, you know...whenever something comes from the department that has a legal issue involved in, and the principals doesn't understand it or he needs some clarity, he always calls me and asks me, and then I must go to the schools Act of the Employment Act or the SACE act and show him exactly where it is and what it says, because I know exactly where to go and find it now, and that is already a good start – P12*

*Hier sit 'n juffrou of 'n meneer voor my en hulle weet nie, en jy kan vir hulle sê rustig mense, dís wat dit beteken...hulle praat op hierdie manier...jy weet, ek kan 'n brief skryf aan 'n ouer wat dalk redelik aggressief is, en ek gebruik net die terminologie en skielik is die ouers 'wow', hierdie ou weet waarvan hy praat, ek gaan liever nie verder met hom baklei nie*

translated as

*Here you have a teacher in front of you, and they don't know, and you can say to them – take it easy, this is what is meant...you know, I can write a fairly aggressive letter to a parent, and because I am using the correct legal terminology, the parent says wow, this guy knows what he is talking about, I should rather not pick a fight with him - P15*

#### **6.6.2.5 A Wider Perspective on Leadership and Leadership Styles**

Many participants experienced and perceived the tools and artefacts in the education leadership learning activity system as having made a positive contribution to their

ability to see and understand a wider perspective on education leadership and on different leadership styles.

*In daai opsig het dit my leierskapsstyl beïnvloed...dit het my 'n weyer perspektief gegee oor my besluitneming en my totale leierskap...jy weet, ek sou dalk 'n baie meer eng leierskapsmodel gevolg het as 'n ou nie byvoorbeeld hierdie agtergrond gehad het van die 'human resource management' nie*

translated as

*In that respect it influenced my leadership style...it gave me a wider perspective on decision-making strategies and on my entire leadership style...you know, I think I would probably have followed a far more narrow leadership model if I didn't have the background in for example human resource management – P14*

*The other strategy that I learned was to manage by walking around...as a principal sometimes I just go around the school...just walking around ...you see, teachers will just stand up and do their work if they see you walking around...even the support staff...the helper-mothers who are cooking for our learners... they would stand up...but also the leadership styles...you know, I realise that I don't have to use only one leadership style when I am leading an institution...even if I favour a democratic style of leadership, but I learned many other leadership styles that...um...let me give an example of a clergy kind of a leadership style...where you work like a priest – you support educators and even giving them pastoral care – P13*

*So it's about working together, although I am in management and I can give them instructions, I am the type of person...I would ask them to do it and not just say you must do a, b and c...so please do it, or let's do it together or something like that, so...so walking with my staff and working with them, that's important to me, and that is something that has come out of the programme for me – P12*

Participant 8 made special mention of what she calls leadership *wisdom* -

*Really, the way I think, the way I do things, and my approach in life also, and even in the way I deal with the people that I work with – because I am managing people where I am sitting – I have been empowered by those modules...really. I am wiser, I know how to handle different situations...like resistance from others here at work...I am wiser. My mind has been opened...I know now that even conflict is something that I must handle, and I have the skills to do that - P8*

#### **6.6.2.6 Improvement in Internet and ICT Skills and Utilisation**

Some participants also reported that the frequency and effectiveness with which they use ICTs has contributed positively to their education leadership practice.

*Presently, when it comes to issues of e-mails and what-what...because at school we don't have e-mail...so they always ask me, if they want any information from the Department, they come to me and ask if I can help them with the information, so then I use it – P9*

*Ja, the issues of time and again using the internet, it helped us a to, I mean it helped me a lot in the school, because at school level, when we need information, it is now very easy, because we have got some computers today, and it simplified the whole thing, then I started to be knowledgeable much in terms of that – P10*

*Look, at times I emailed the circuit manager and even the Department of Education...I am talking of provincial and district and even circuit...principals who are still waiting for a circular...the very same day they send a circular from the head office, I access it from the email...so I must say I am a bit ahead, and that gives me ample time to prepare tasks, you know – P13*

*Exposure to the internet...you see, I wasn't even able to press a button on a computer from the beginning when I started, and I must indicate that I did not*

*go to a computer school, but the University of XXX exposed me to that, and now I am operating at school level...operating...even today, the reason why I came late is because I was preparing schedules – P13*

*We were also introduced to the computer system, because, you know, we were born before technology...me myself, I even struggle now to work with the computer, but when I was there, I can remember, I could type my assignment, but I was just slow...and sometimes I would ask the students of the university – those who are staying on campus, when they are not doing anything, I would ask them to come and type my assignment for me...so I was able to type from the computer, I was able even to print from the library, I was able to use the library from the computer and I was even able to use the machines from Minolta (copying and printing facility on campus), so I think it was appropriate, especially for us who had no access to computers when we grew up – P11*

#### **6.6.2.7 The Importance of ICTs in Education and Education Leadership**

A realisation of the importance of the effective use of ICTs, both while a student and also back at school in their real world, is another contribution that the participants ascribe to the programme.

*Ek sit in daai lesing lokaal en ek kan die 'tablet' aansit en dan kom XXX se wifi op...en dis waar die dinge begin 'trigger' het...ek wil dieselfde goeters hier inbring...um...net vir jou personeel...sodat die personeellid dit wat nou in die werklikheid gebeur vir die kinders kan gaan wys*

translated as

*I sit in that venue and I switch on the tablet and the (name of institution) wifi comes on...and that is where things got triggered...I want to bring the same stuff in here (at school)...just for the staff...so that each staff member can go and show the learners that which is happening now in the real world – P4*

*Yes, because...um...when I needed information of whatever kind at school, I knew that information is there...if I can search for it, I can tailor-make it for my situation and then use it for my benefit – P5*

*If I come across things that I don't understand, then the first thing that I would do is go to like Google around to see what others are saying around that particular topic before I can share with others – P6*

*Ek meen... 'n ou besef nou die belangrikheid van ICTs in terme van navoring en studies en van die toekoms*

translated as

*I mean...one realises now the importance of ICTs in terms of research and studying and for the future – P14*

### **6.6.3 Rules**

#### **6.6.3.1 Values and Skills that Contributed to Leadership Practice**

Data from the interviews reveal that participants learned a number of skills and values that they report contributed positively to leadership practice.

##### **6.6.3.1.1 Responsibility**

Comments from the participants show that they learned a sense of responsibility from their interaction with the rules of the education leadership learning activity system.

*It was a responsibility – you committed yourself, you registered, and that means you must comply to whatever rules and requirements – P8*

*Jy doen hierdie tipe werk en jy doen hom reg, en jy gaan nie 'duck and dive' en kyk of jy kan wegkom met moord nie...dan mis jy die hele punt van die program*

translated as

*You do this kind of work and you do it right, and you aren't going to duck and dive to see whether you can get away with murder...then you are missing the point of the programme – P14*

*Jy kom klas toe, jy handig jou goeters betyds in, jy berei bietjie voor vir jou klasse, jy 'share' jou ervarings in die klas...jy kom klas toe op Saterdag – dis toewyding*

translated as

*You come to class, you submit your stuff on time, you prepare a little before lectures, you share your experiences in class...you come to classes on Saturdays – that's commitment – P15*

#### 6.6.3.1.2 Time management, time consciousness and being organised

Another of the values that participants reported learning from their interaction with the rules is greater awareness of time and of the need for punctuality.

*Late-coming was not accommodated...we had to be punctual, and again, when we attend there, you cannot just leave any time – P8*

*We needed to be there on time...I have learned the issue of being time-consciousness from the university...I also learned from the university that when they say the lesson starts at 8, it is time...2 minutes, 3 minutes before that, we must be seated, ready for that, you see. I have learned that and I have become disciplined in that line – P10*

*The culture to be organised...that element of the programme has to be translated into my school where I am teaching...that my school has to be organised – P13*

A skill related to punctuality that participants reported learning from their interaction with the rules is the ability to manage time better.

*You had to make an appointment to see the lecturers...make an appointment in advance...and that was fine for me...I try to function the same way now in my job...if you want to see me, make an appointment, and I try to do it so that if I want to see someone, I make an appointment with them...I think it is a good system – P12*

*The issues of time...you know, the things at the university – I have found them to be running logically...like having times to go for the classes, times for the breaks...also, with the good support sessions and other programmes that are running at the same time throughout the whole day...it helped me to understand that really, all these things are well-planned and we get used to that, and then also prepare ourselves for that particular way of doing things at our schools – P10*

#### 6.6.3.1.3 Independence

Participant 6 reported that she experienced, as part of her education leadership learning, a great improvement in her ability to work independently.

*What I learned is how to be independent in the sense that some of your peers – the ones that are attending the very same courses with you – some of them are working far away, and then there is no time for you to...come together as we used to do in the previous studies, so you learn how to be independent. The fact that I had to learn to work independently had an influence on my work...I think that it had a very positive impact in the sense that I can initiate projects now – P6*

### 6.6.4 Community - Contribution to leadership practice

#### 6.6.4.1 Professional Support

The one aspect of the element of the community of the education leadership learning activity system that came out very strongly in the interview data was that of professional support. Participants reported that this aspect of the programme contributed positively not only to their leadership practice, but also to their experiences and perceptions of their education leadership learning while enrolled in the programme.

*Some of them were school principals, deputy principals, HOD's...and myself, I was just an ordinary educator, so I didn't know much of the things that were*

*happening at schools, so by interaction with those people, I learned a lot – how things are done, and the challenges that they are having...no...definitely, they helped me – P8*

*There were one or two principals and there were some people...there were HOD's, and as far as the HOD's went, I could learn from them or give them...if they were new...I think there was one who started as an HOD in 2010...or during the course of that year...so those of us who had been there for a couple of years, we could give advice, and also with the principals...there was one principal...he would give his point of view as a principal when we did things like education law or financial management – P12*

*I think for me it had a very positive impact in the sense that, as I was saying, I didn't have...you know...that much experience, so I would...you know...time and time again I would appreciate it when we had to come together because...I means...this is where they would come up with the practical examples of what they have experienced – P6*

*Ek het baie by die ander ouens geleer...ek het by ou XXX baie geleer...hy was 'n hoof gewees...kyk hy was daai tyd al dink ek drie jaar 'n hoof gewees, of twee jaar, en ek kon hom bel en vra nou wat van dit...hy was ook baie betrokke by die (name of union) gewees as ek dit nie mis het nie...ja, ek kon hom bel...*

translated as

*I learned a lot from the other guys...I learned a lot from old XXX...he was a principal...look, he had at that time already been a principal for three years or two years, and I could phone him and ask him so what about this or that...he was also very involved in the (name of union) if I am not mistaken...yes, I could phone him...– P2*

*Ja, as I said...um...were are all from a variety of fields and at different levels...the advice one got...one grew and gained some knowledge and experience he could not have gained when he was not part of the programme, and at the very same time, we were learning whilst we were at work, so I was*

*encountering something at school, I could ask for advice from some of my colleagues there (in the programme), then I would be advised. So then hence it was enhancing...the application what I have learned. I have some contact with some of them...others they do call me and ask me how I am doing, and others are not aware that I have moved – P5*

*Yes, I can say that it had an impact on my life...and at school...I have learned many things from them, because many of them were managers at that time, so the knowledge that I gained from them, I am able to apply at the school, although I am not in that position yet – P9*

*Definitely, it had an impact – they had more expertise, and they started to tell me how they do things at their own schools, and you would feel that you would also have to take some of the things...the way they do things...and practice them at our own school. Also, if I want to do something here at our school, and I know we did it at university, but I can no longer remember something that we did, then I would contact them, and they would say that one was like this and so on, then I will implement it here – P10*

*I think there was one who started as an HOD in 2010...or during the course of that year...so those of us who had been there for a couple of years, we could give advice, and also with the principals...there was one principal...he would give his point of view as a principal when we did things like education law or financial management – and he gave us advice on how to do things and things that you had to look out for, so I did learn quite a bit from my fellow students – P12*

*Those who were in more senior positions in their jobs would help us...those who were just 2 years as an HOD, 3 years...so we could get advice from them and we could also give advice from the others, and like I say, 9 times out of 10 the advice was constructive, so we formed a good group where you could critique someone and they would accept it as constructive – P12*

This brings to a conclusion the presentation of the findings for research sub-question 3, and to the presentation of the findings for this study into the experiences and perceptions of master's students of their own education leadership learning while enrolled in a postgraduate educational leadership programme.

## **6.7 Summary**

This chapter presented the findings of the study on the experiences and perceptions of students of their own education leadership learning while enrolled in a master's degree programme in education leadership at a selected South African university. The presentation of the findings began with a detailed description of the participants in the study and the context within which they function as education leaders, and then continued with the presentation of the findings of the study using the elements of Engeström's (1987:78) Activity Theory as a template. Within this template, the findings per research sub-question were presented in the way they emerged from the interview data were presented.

Chapter 7 of this thesis will present an overview of the study and will discuss the findings presented here in relation to the major concepts and ideas revealed during the review of the literature on education leadership learning presented in Chapters 3 and 4. That chapter, the final of the thesis, will answer the research questions posed at the outset of the study, and will also present the recommendations that flow from these findings and the contribution of the study to the body of knowledge on education leadership learning.

## CHAPTER 7

### Discussion of Findings, Contribution, Overview and Conclusion

#### 7.1 Introduction

This final chapter presents a comprehensive discussion of the findings - as they were presented in Chapter 6 - in relation to the theoretical framework and the literature on education leadership learning and learning theory presented in Chapters 3 and 4. After the discussion of the findings, a number of recommendations based on the findings of the study will be made, followed by a discussion of the contribution of the study to the body of knowledge on education leadership learning.

This chapter will conclude with an overview and summary of this study into the experiences and perceptions of master's students of their own education leadership learning while enrolled in a postgraduate degree programme in educational leadership.

#### 7.2 Discussion of the Findings

Because the findings for research sub-questions 1 (aspects of the programme that made the greatest contribution to education leadership learning) and 3 (aspects of the programme that made the greatest contribution to leadership practice) show a significant number of overlaps, these findings will be discussed together, while the findings for research sub-question 2 will be discussed separately. The elements of Engeström's (1987:78) Activity Theory as they pertain to the education leadership learning activity system outlined in Chapter 2 of this thesis will once again be employed to structure the discussion of the findings for all of the research sub-questions.

## **7.2.1 Aspects of the programme that contributed to learning and to practice**

### **7.2.1.1 Tools and Artefacts**

7.2.1.1.1 The programme empowered the participants both as leaders and as researchers

Participants identified two modules as part of the tools and artefacts of the education leadership learning activity system that they perceived as having made the greatest contribution to their education leadership learning practice, the one being the module on education law and the other the module on human resource management in education.

The module on education leadership, although perhaps a natural choice in this regard, was discounted by a number of participants because, in their experience, it contained and presented much of the information on leadership that they had already studied, and thus disregarded their pre-knowledge and their leadership experience. This links closely with the findings, discussed later (section 3.2.1) , that some of the participants' experienced and perceived the tools and artefacts of the education leadership learning activity system as failing to acknowledge their own pre-knowledge and leadership experience.

The participants' experience and perception of the law and human resource management modules as having made a significant contribution to their leadership practice confirms to some extent the contention of a number of authors (Bush & Jackson, 2002:412, Paterson & West-Burnham, 2005:110, Bush & Moorosi, 2011:68) that there exists an international curriculum for education leadership learning, with these two modules and their content as an important part of that curriculum.

From the interview data it emerged that the participants generally experienced and perceived their interaction with the content of the modules in the education leadership learning activity system positively, reporting that the module content had empowered them to achieve the outcome of that system, namely to do their work as school leaders better. When one considers the fact that school improvement is dependent on the quality of teaching and learning in classrooms, and that that quality

is dependent - albeit indirectly (Leithwood *et al*, 2008:27, Brauckmann & Pashiardis, 2011:12) through the mediated impact school leaders have on both the work that the members of a school's staff perform and also on the climate and culture of a school (Early & Evans, 2004:335) - on the quality of leadership existent in a school (Rhodes & Brundrett, 2009:362), then the participants' experience and perception of their own education leadership learning as empowering is significant for its contribution to their education leadership practice, and also because it substantiates the findings of for example Menter *et al* (2006:8) whose graduates of the Scottish Qualification for Headship (SQH) programme reported that they experienced, among other things, an increased effectiveness as a leader, and Bush *et al* (2008:193) who found that the New Visions programme offered under the auspices of the NCSL in England contributed significantly to the graduates' knowledge of education leadership theory and practice and their ability to influence people.

In addition to their perception that the content of the programme empowered them as leaders, the participants also reported that their participation in the research-focused modules and their completion of individual research projects which culminated in the production of a dissertation of limited scope also allowed them to attain research and other academic skills, which they reported as having made a valuable contribution to their experience and perceptions of their own education leadership learning.

#### 7.2.1.1.2 Participants gained confidence and a leadership identity

Participants also reported that their interaction with the tools and artefacts of the education leadership learning activity system assisted them to achieve the outcome of that activity system in that it helped them to develop both leadership confidence and their own unique leadership identity, while at the same time assisting them to identify their own education leadership short-comings. This finding corroborates the findings of both Menter *et al* and Bush *et al*, the former of whom, in their evaluation of the Scottish Headship Qualification (SQH), found that students of that programme valued the fact that it increased their personal and leadership confidence (Menter *et al*, 2006:8), while the latter, in their evaluation of the New Visions programme, reported that the participants valued the significant increases in their leadership confidence (Bush *et al*, 2006:185). South African studies have reported similar

findings, with Moorosi (2014:799) reporting that both the serving and the aspiring leaders who participated in the ACE:SL stated that their education leadership learning during the programme brought about both an increase in their self-confidence as leaders as well as the development of a distinct leadership identity.

A number of participants also reported that they were able, through their interaction with the tools and artefacts of the activity system, to work on and develop a personal leadership identity or *persona*. This, they reported, together with an increase in their leadership confidence, contributed significantly to their own education leadership practice.

When seen in the light of the fact that, internationally, there is a growing belief in and recognition of the fact that school leadership is a profession in its own right (Huber, 2010:230), and against the backdrop of the fact that modern school leaders function on a higher level and under considerably more pressure than school leaders of old (Davis *et al*, 2005:3) as a result of among other things the increasing decentralisation of education in South Africa specifically, bringing with it increased responsibility for matters such as policy implementation, school and learner performance and the management of staff (Christie, 2010:699), then the participants' perception of their own leadership learning as having increased their levels of personal and leadership confidence is a significant step towards the achievement of both the object (education leadership learning) and outcome (effective education leadership practice) of the education leadership learning activity system.

Another contribution of their interaction with the tools and artefacts of the education leadership learning activity system to their own education leadership practice was their perception that their education leadership learning enhanced both their ability to empower those that they lead, and their capacity to advise and assist others with for example leadership and legal advice. This finding links with what research into the knowledge, understanding and skills that effective leaders have, *inter alia* an understanding of and the ability to develop people (Bush, 2012:5), and echoes the findings of Menter *et al* (2006:8) whose SQH students reported an enhanced ability to support others. It is also significant to note that one of the seven (7) foci of an instructional leader, according to Leithwood *et al* (2012:22) is planning, organising,

managing and controlling a wide range of staff developmental activities, a function which the participants' perceive that they are now better able to perform after their interaction with the tools and artefacts of the education leadership learning activity system.

#### 7.2.1.1.3 The theory learned could be applied to practice

The fact that the participants reported that the theory that they learned in the modules was applicable to their leadership practice and could be transferred to that practice, even before they had graduated from the programme, flies in the face of critique by some authors (Hale & Moorman, 2003:4, Hess & Kelly, 2005:3) that many education leadership learning programmes are far too theoretical and totally unrelated to and out of touch with the daily tasks and functions of school leaders, and instead supports the results of studies such as Walker and Dimmock's (2006:126) study of the Hong Kong-based Education and Manpower Bureau's education leadership learning programme for newly appointed principals, which found among other things that participants valued the fact that the learning offered in the programme could be linked to their school and specific leadership contexts and practice. While it is important to note that the programme reported on by Walker and Dimmock is not at the same level as the programme that served as the activity system for this study, this finding is not reporting or suggesting a comparison between the two programmes, but rather the similarity in importance ascribed by the students of both programmes to the fact that they were able to transfer what they learned in theory to their education leadership practice. Furthermore, the participants in this current study's experience and perception of the applicability and transferability of the theory they learned in the course work component of the programme to their own leadership practice corroborates Huber's (2010:230) suggestion that "the dovetailing (of the) theoretical and practical aspects (is) essential" when designing effective education leadership learning programmes.

However, it must be also noted that the participants' experience and perception that the theory they learned during their participation in the programme transferred easily to their education leadership practice flies not only in the face of critique of some authors (Hale & Moorman, 2003:4, Hess & Kelly, 2005:3) that many education

leadership learning programmes are far too theoretical, but also appears to fly in the face of the stated purpose of a master's degree such as the programme that served as the activity system for this study, namely "to educate and train researchers who can contribute to knowledge at an advanced level (Government Gazette No. 36797 of 30 August 2013:72). This finding could also therefore conceivably be considered a criticism of the programme that served as the activity system for this study, in that it may create the perception that this degree, by making theory transferable, is for some reason not fulfilling its intended purpose of educating and training researchers. This perception can however be refuted by the findings of this study reported in paragraph 7.2.1.1.1, where participants reported that, in addition to their perception that the content of the programme empowered them as leaders, their participation in the research-focused modules and the individual research projects which culminated in the production of a dissertation of limited scope also allowed them to attain research and other academic skills, which they reported as having made a valuable contribution to their experience and perceptions of their own education leadership learning.

#### 7.2.1.1.4 The modules provided an introduction to instructional leadership

Participants identified instructional leadership as the prominent education leadership theory throughout the course work component of the programme. This theory, described and defined in Chapter 4 as school leadership actions and activities that focus on the learning progress of learners and that encompass management as well as leadership-orientated roles, activities and functions directed toward such progress, is widely cited (Southworth, 2002:77, Huber, 2010:673, Hallinger, 2010:332) as "the linchpin" between school leader practices and learner achievement (Jacobson, 2011:34), and the participants' experience and perception of this theory as the foundation of the programme, together with their perception that the theory presented during the course work component of the programme is applicable and transferable to their leadership practice, speaks to their acquisition or improvement of one of the sets of skills and knowledge that Bush (2012:5) suggests that effective education leaders should have, namely the ability to lead the teaching and learning programme at a school. It is also interesting to note here that Donmoyer *et al* (2012:10), in their review of an education leadership learning programme classified as an exemplary

one, found that participants assigned great value to the fact that the programme's focus was on collaborative and distributed leadership and the need for leaders in education to be instructional leaders. The participants' experience and perception of instructional leadership theory as meaningful therefore speaks to their achievement of both the object and the outcome of the education leadership learning activity system.

#### 7.2.1.1.5 The perception of learning material as a resource

As far as the learning material employed in the programme is concerned, participants reported that this material had made a positive contribution to their experience and perception of their own leadership learning, and from the interview data it is clear that many of the participants view the material as a leadership resource that they still use in their leadership practice. This finding corroborates that of Bush, Kiggundu and Moorosi (2011:31), who found that as much as 80% of the students of the ACE:SL programme reported that the teaching and learning material was and remains of great help and value to them. However, this must be seen in the light of the difference between the ACE:SL programme, a certificate level programme, and a master's degree programme in educational leadership.

#### 7.2.1.1.6 The use of instructional applications appropriate to adult learners

With regard to the instructional applications or teaching and learning strategies they experienced during their enrolment in the programme, the participants identified the use of applications and strategies *appropriate to adult learners* as having made the greatest contribution to their experience and perception of their own education leadership learning, and therefore to the achievement of the object of the activity system. This finding speaks directly to the issue of the link between education leadership learning and theories of learning as alluded to by Davis *et al* (2005:9) who posit that such programmes must link theory to practice within a framework of adult learning theory. In Chapter 4 the researcher suggests that andragogy - John Knowles's learner-centric theory of learning that focusses specifically on the way adults learn (Knowles, 1984:6, Tight, 1996:103) - is most appropriate to the education leadership learning activity system, and the value that the participants in this study assigned to this aspect of the tools and artefacts of the study appears to

underpin this suggestion. However, it must be re-iterated here that, as stated in Chapter 4 (see section 3.1.2 in that chapter), andragogy is not the only learning theory appropriate to adult learning or to the education leadership learning activity system, and that other constructivist theories such as Vygotsky's Social Development Theory (Schunk, 2012:242), the Situated Cognition Theory of Brown, Collins and Duguid (Leonard, 2002:173) and the Situated Learning Theory of Lave (Leonard, 2002:174) would suit this activity system too. In fact, it is worth repeating here the statement by Hergenhahn and Olson (2001:50) who, when answering their own question of "which paradigm is correct?" answered "probably all of them".

Within the framework of applications appropriate to adult learners, the participants experienced a number of applications that they reported as having contributed positively to their own education leadership learning and thus to their achievement of the object of the education leadership learning activity system, including individual self-study, classroom discussions and the use of presentations by the students themselves. The appropriateness of individual self-study is corroborated by Chikoko (2010:45) who found a culture of self-directed study among the successful students in the master's programme he investigated. As well as being linked to the use of the inverted or *flipped* classroom instructional application (Lage *et al*, 2010:32), individual self-study also appears to indicate the predominance of the constructivist paradigm of learning theory in this programme over the cognitivist paradigm, because while the latter tends to be more instructor-centric (Leonard, 2002:97), the former is, generally speaking, more learner-centric (Leonard, 2002:112). The use of discussions and student presentations as instructional applications also proved popular among the participants of Chikoko's 2010 study, who reported that they found these teaching and learning strategies the most beneficial, adding that learning together and from one another in that way "promotes deep understanding" (Chikoko, 2010:40).

The assumption made above that the constructivist paradigm of learning theory predominates in this programme is further strengthened by the participants' identification of discussions and student presentations as instructional applications employed in the programme, as does their perception that other instructional applications such as sharing their experiences with members of the activity system's community and benefitting from the experience of other members of that community, and their report that a sense of collegiality and cooperation also contributed to their

positive experiences and perceptions of their educational leadership learning. The matter of sharing experiences echoes one of the tenants of andragogy, namely that adults have life experience, and that each individual in the community of for example an education leadership learning activity system represents a rich learning resource (Tight, 1996:104, Knowles, 1984:11). Sharing experiences also represents one of the key elements of for example Vygotsky's social development theory, which posits that the experiences that learners bring to new learning situations or contexts greatly influence the learning that they and others in the learning activity system do (Schunk, 2012:245).

#### 7.2.1.1.7 The contribution of assessment to education leadership learning

Participants reported that, as part of the tools and artefacts of the programme, the assessment strategies employed in the programme, especially the use of portfolios of evidence, were meaningful and contributed positively to their experience and perception of their education leadership learning. This appears to contradict the findings of another South African study, that of Bush *et al* (2011:37) who found that one aspect of their education leadership learning during the ACE:SL programme that students were critical of was the use of portfolios of evidence as an assessment strategy. In this regard, the programme evaluation team came to the conclusion that students found these portfolios very difficult to produce (Bush *et al*, 2011:38). The difference in perception between the participants in this current study and that of the students in the study conducted by Bush and his colleagues might be ascribed to the difference in the academic level of the programmes, the current study being of a master's degree programme with students at an academic level suitable to that degree, and the Bush study focussing on an advanced certificate level programme where the majority of participants would be at a different level of academic competence. However, it must again be re-iterated that the opinion on portfolios of evidence, although substantiated by the majority of participants in the current study, was by no means unanimous, suggesting that programme designers should consider carefully the inclusion of assessment strategies that not only *contribute* to the students' achievement of the object of a particular learning activity system, but indeed *facilitate* that achievement, in other words assessment strategies that not only check that students have learned, but contribute to that learning. An example of

such assessment is dynamic assessment (Leonard, 2002:57), which allows peers to assess and evaluate one another both formatively (to assess progress in learning) and summatively (to assess extent of learning).

#### 7.2.1.1.8 The perceptions of the use of ICTs as tools and artefacts

In the matter of the use of ICTs as part of the tools and artefacts of the programme, many participants valued – both as part of their learning and as a factor that contributed positively to their leadership practice - the exposure to and practice in the use of the internet that they experienced while enrolled for the programme, as well as the internet and research skills training provided by the Institution. However, questions about the Institution's use of an electronic learning platform brought mixed reactions, with some participants reporting that, in their opinion, the ineffective use of this platform did not contribute significantly to their experience of their own education leadership learning, while others valued the use of this platform positively.

This study's finding that participants valued the internet- and research skills training provided by the Institution echoes Menter *et al's* (2006:13) finding among SQH students that the programme increased the value they placed on research, theory and academic reading. This finding not only substantiates to some degree the assertion made in Chapter 3 that education leadership learning should ideally be presented at postgraduate level, where research and academic reading would be part of the primary curriculum for the academic component of a programme, but also brings to mind the question, raised in that same chapter, of whether to present education leadership learning in the form of a professional degree or as an academic degree. This question will be dealt with on more detail later on in this chapter.

#### 7.2.1.2 Rules

As far as their interaction with the rules of the education leadership learning activity system and their own education leadership learning is concerned, the participants reported that the rules of the activity system boosted their confidence in both their academic and leadership abilities, and assisted in the creation of a disciplined learning environment which they felt contributed positively to their experience of their

own education leadership learning by prescribing dedication, hard work and by setting high academic standards.

The first of these findings related to the rules of the education learning activity system, namely that they boosted participants' confidence in both their leadership and academic abilities, links closely with the earlier finding that participants gained leadership confidence and a leadership identity from their interaction with the tools and artefacts of the activity system. The participants' perception that their interaction with the rules of the activity system created a disciplined learning environment where they were able to learn certain leadership values (dedication, hard work and setting high standards) speaks again of the existence of an incidental curriculum in that the rules, put in place to regulate the activities within the activity system, do not make up the primary curriculum, but contribute to both the object and the outcome of the activity system - education leadership learning and effective education leadership respectively in this case – indirectly.

With regards to the contribution of the rules of the education leadership learning activity system to their leadership practice, participants reported the acquisition of both skills and values from their interaction with the rules of the education leadership learning activity system – values and skills that they experienced as having made a contribution to their education leadership practice. This finding confirms the finding of Menter *et al* (2006:11) who reported that the SQH (Scottish Qualification for Headship) participants experienced an enhancement of their professional values during their participation in that programme. A number of participants reported that the rules of the activity system taught them a greater sense of responsibility in both their academic work as students and in their work as education leaders, while the second value they reported, that of time consciousness, is closely allied to the skills required for effective organisation and time management. This finding is interesting in that it contradicts the finding of Van der Westhuizen *et al* (2004:715) who, when reporting on the delivery of an ACE programme in the Mpumalanga province of South Africa, found that participants in their study classified their education leadership learning as only partially successful, because, in their opinion, aspects such as strategic planning, time management and the management of change had not been dealt with sufficiently to make a difference at school.

### 7.2.1.3 Community

The participants perceived their interaction as subjects of the education leadership learning activity system with the community of that system, i.e. all the other students enrolled in their particular year group or cohort, as having added value to- and having had an impact on their experience and perception of their own education leadership learning. The value that participants reported as having been added to their education leadership learning experience by this interaction is clear from their use of words and phrases such as *friendship, support and advice, widened perspectives, opportunities to network* and *to share* in both fears and triumphs and the *empowerment to understand and better deal with diversity* that they experienced through the interaction with a community of students with diverse backgrounds and leadership experience.

#### 7.2.1.3.1 Widened perspectives on leadership and diversity in South Africa

Participants valued the wider exposure to and perspective on both leadership as a phenomenon and on the leadership contexts and challenges of leadership colleagues in a wide variety of South African educational settings that their interaction with the tools and artefacts as well as the community of the activity system provided for them. As mentioned in Chapter 6, many of the participants commented on the fact that they valued the learning they did *about others* in the system – their challenges, their leadership perspectives and the ways in which they lead - and their subsequent empowerment to understand and deal with diversity better. This finding is significant in the light of what Bush and Moorosi (2011:62) suggest about the diversity present in education leadership learning strategies and programmes across the world. This diversity, they believe, is the result of the different contexts and also the different conceptualisations of education leadership - together with the great diversity of educational and leadership issues that are being dealt with - in both the developed and developing world. Lumby *et al's* (2008:xxx) suggestion that education leadership on the international front “no longer serves the homogeneous communities that existed before globalisation”, together with the fact that in the *rainbow nation* that is South Africa, the diversity of languages and cultures creates a diversity not easily

matched in any other country in the world, further substantiates the importance of the finding that the participants' experience and perception of their education leadership learning as having widened their perspective on education leadership in the South African context. It also means that, to some extent, these participants' experienced their education leadership learning as having prepared them for what Lumby *et al* (2008:7) call "global heterogeneous communities". Finally, it is interesting to note the correlation between this finding and that of Heystek (2007:502) whose ACE:SL participants reported that that programme had, as mentioned in Chapter 3, prepared them to meaningfully critique and challenge many aspects of the prescribed policies and approaches, the link being that education leaders with a wider perspective on education and education leadership in South Africa would, in fact, be better prepared to critique and challenge the current system and practices.

#### 7.2.1.3.2 Opportunities to network

The participants perceived their education leadership learning as opportunities to not only widen their perspective on education leadership in South Africa, but also to network with others in the education leadership community. Networking and creating networks, according to Day and Harrison (2011:459), involves connecting members of an organisation to one another and also to members of other similar organisations in order to enhance both socialisation and an understanding of the value of team work, collaboration, improved resources and problem-solving, and is often rated as among the most popular and valued education leadership learning activities (Bush *et al*, 2007:87, Earley & Weindling, 2007:4). This is confirmed by the findings of for example Walker and Dimmock (2006:136) in their study of the Hong Kong-based education leadership learning programme for newly appointed principals, Bush *et al*'s (2006:185) results of their evaluation of the New Visions programme of the now defunct NCSL in England and, locally, by Moorosi's (2014:800) study of the ACE:SL.. A significant indicator, according to both Donmeyr *et al* (2012:10) and Day and Harrison (2011:459) of networking opportunities within education leadership learning programmes is the use of cohorts, a feature of the programme that served as education leadership learning activity system for this study.

#### 7.2.1.3.3 The community as support and motivator

Participants also reported that they experienced the impact of their interaction with the community as a source of motivation to continue and complete the programme. One of the six (6) assumptions of andragogy is that adults are generally self-motivated by intrinsic factors such as improved self-esteem and recognition (Knowles, 1984:12). As posited earlier, the selection and application of appropriate tools and artefacts (for example instructional applications and content) can lead to the satisfaction of the education leadership learners' "need to know" (Knowles, 1984:11). However, in addition to the tools and artefacts as a source of motivation, this finding shows that the interaction of the subjects with the *community* of the activity system also serves as a source of motivation.

The one contribution to their education leadership practice that participants experienced during their interaction with the community of the education leadership learning activity system is that of professional support. This finding echoes and substantiates those on the participants' interaction with the instructional applications or teaching and learning strategies as part of the tools and artefacts of the activity system, in that these applications or strategies made provision to some extent for collaboration and mutual support among members of the community in that activity system. The matter of the personal, academic and professional support received from the members of the activity system community is also closely related to the perception and experience of the participants of the contribution of networking to both their learning and their leadership practice, a fact confirmed by research. Walker and Dimmock's (2006:136) Hong Kong students valued the opportunities to bond with and develop interpersonal relationships and networks with fellow students, while the New Visions students in Bush *et al's* (2006:193) study reported that they valued the opportunity to share and discuss problems with other school leaders and the support they received and were in turn able to provide.

However, it is key to note at this juncture that participants reported that, even though the interaction with the community of the education leadership learning activity system contributed positively to both their education leadership learning experience and their own education leadership practice, they experienced and perceived this interaction with the community *predominantly on an informal level*, and not as a planned or integrated instructional application or teaching and learning strategy.

#### 7.2.1.4 Division of Labour

The interview data reveals that participants classify the role players within the division of labour of the education leadership activity system as either primary or supplementary role players. They place the Institution's administrative staff as well as study groups in the former category, while the latter category is reserved for fellow students, lecturers and supervisors.

The interaction with the students as the subject of the activity system with the Institution's academic staff is perceived by the students to have made a positive contribution to their education leadership learning experience, as did their interaction with study groups. However, the classification of study groups as a supplementary role player within the division of labour is surprising, considering the findings described in 3.1.3 above regarding the value that participants felt their interaction with their fellow students as the community of the activity system had on their education leadership learning experience. This can possibly be ascribed to the fact that although many of the participants reported that they had worked together with fellow students at various times during the programme, these collaborations were never formal or a programme recommendation or requirement, and were therefore possibly not employed to best effect.

As an instructional application or teaching and learning strategy, the use of study groups falls within the ambit of the constructivist paradigm – the use of such groups would constitute the creation of situations wherein learners can become actively involved in their own learning (Schunk, 2012:231, Leonard, 2002:37), and considering that the emphasis in the 21st century appears to have shifted from *what* is taught (content) to *how* the content is designed and delivered (Bush, 2012:6), the use of instructional applications or teaching and learning strategies such as study groups would be both appropriate to adult learners under the tenants of andragogy and would facilitate the personal, academic and professional support that participants valued and contribute to the motivation of participants to complete the programme,

whilst creating numerous additional opportunities for participants to network with peers in order to widen their perceptions of leadership and leadership diversity – another aspect of the programme that participants experienced and perceived as having made a positive contribution to both their learning and their leadership practice.

In the light of the above and of the findings presented in 3.1.3 above, it is not surprising then that the participants categorised their fellow students as primary role players within the division of labour of the education leadership learning activity system.

## **7.2.2 Aspects of the programme that posed challenges to learning**

Research sub-question 2 dealt with the aspects of the educational leadership programme that the participants experienced and perceived as having acted as barriers or challenges to their own education leadership learning.

### **7.2.2.1 Tools and Artefacts**

#### **7.2.2.1.1 Failure to acknowledge prior knowledge and experience**

The greatest barrier with regard to the tools and artefacts of the education leadership learning activity system that emerged from the interview data was the fact that a number of participants, in their interaction with both the module content and materials and the instructional applications or teaching and learning strategies of the activity system, experienced and perceived these tools and artefacts as having failed to acknowledge or take into account their own leadership pre-knowledge and leadership experience.

In terms of the instructional applications or teaching and learning strategies employed during the programme, some participants reported that in some modules they experienced the failure of these applications or strategies to differentiate between those students with experience and those without, contributing to their perception that some aspects of the tools and artefacts of this education leadership learning activity system acted as barriers to their own education leadership learning.

The researcher would again like to suggest - just as he did with the experiences and perceptions of the participants regarding the use of ICTs in the programme - that this finding and its implications for the experiences and perceptions of the participants of their own education leadership learning must also be seen through the lens of the diversity of leadership experience and knowledge among leaders not only within the community of this particular learning activity system, but within the context of the South African education system as a whole. Referring back to paragraph 6.2.3 on page 180 where the researcher provided a detailed discussion of the context from within which the participants of this study came, a closer look at that *context* – in terms of school quintile - of the participants who perceived the failure of some parts of the programme to take into account their own pre-knowledge and experience, reveals that all of them (P1, P2 and P15) work in high quintile schools (P1 and P2) or private schools (P15), schools that are generally well-financed and well-resourced (Motala, 2006:86; Lumby, 2015:403) and where education leaders could conceivably be expected to have completed more leadership programmes and courses and where they would conceivably have been exposed to examples of strong leaders and effective leadership practice (Motala, 2006:86; Branson & Zuze, 2012:72; Lumby, 2015:405; Pienaar & McKay, 2014:107). This finding, in the opinion of the researcher, has important implications for the design of education leadership learning programmes in South Africa, and will feature again later in the contribution and recommendations of the study.

#### 7.2.2.1.2 Modules not directly applicable to education leadership learning

The second most frequently mentioned barrier or challenge to participants' education leadership learning was the fact that some of the modules in the course work programme were not directly applicable to education leadership learning. Both Orr (2011:120) and Robey and Bauer (2013:264) believe that exemplary education leadership learning programmes generally feature a coherent curriculum, a concept defined by Davis *et al* (2005:8) as a curriculum with a clear link between the aims and objectives of the programme, the learning content and learning activities or instructional applications and the shared values and beliefs encompassed in the underpinning philosophy or theory of leadership. This finding that a number of

participants experienced and perceived some of the modules as not directly related to education leadership learning may indicate the *absence* or a *lack of clarity and definition* of the link between the object of this education learning activity system, (education leadership learning) and the outcome of the system, namely effective education leadership, and this is a matter of some consequence for designers of education leadership learning opportunities in an education system as diverse as the South African one. This matter will, as is the case with the flexibility of content to acknowledge and utilise education leadership learners' prior knowledge and experience optimally, be discussed later in this chapter.

#### 7.2.2.1.3 Insufficient formal opportunities for collaboration and practice

Although the majority of participants experienced the instructional applications or teaching and learning strategies as appropriate for adult learners and as having made a positive contribution to both their education leadership learning experience and their education leadership practice (see section 3.1.3 above), many reported that not enough use was made of formal opportunities created for interaction and collaboration between themselves as the subjects of the education leadership learning activity system and the community of that system, i.e. the other students in the cohort or year group. Some participants also reported a lack of variety of instructional applications or teaching and learning strategies, with one participant expressing frustration at the fact that, although the use of the inverted or *flipped* classroom (Lage *et al*, 2010:32) was attempted, this novel instructional application was not implemented effectively. The final barrier to education leadership learning related to the instructional applications or teaching and learning strategies employed in this activity system, is the issue of insufficient provision of opportunities to practice new skills and for practical learning situations. This issue should not be confused with the finding reported earlier that the majority of the participants experienced the tools and artefacts of the activity system, specifically the learning content presented in the modules, as applicable and transferable to their education leadership practice.

Learning theories such as for example the Situated Cognition Theory that states, as does andragogy (Knowles, 1984:11), that learning is dependent on the linking or tying of practical or working knowledge to conceptual knowledge (Leonard,

2002:173) and that “learning situations must produce knowledge through work activity” (Leonard, 2002:173), while the humanistic learning theory strategy of holistic learning, calls for cognisance of and making use of the specific learning context within which learning takes place in order to link the new knowledge, skills and attitudes to the learner’s real-life experience and world (Leonard, 2002:85). At the same time, in education leadership learning literature, great importance is placed on education leadership learning programmes that present a coherent curriculum (Orr, 2011:120) and apply instructional applications or teaching and learning strategies appropriate to both adult learners and to education leadership learning (Orr, 2011:120, Davis *et al*, 2005:9), and that make provision for the combination of the theoretical and the practical aspects of education leadership learning programmes (Huber, 2010:230). In the light of the above, this finding requires that designers of education leadership learning programmes take heed when selecting such content and applications.

#### 7.2.2.1.4 Contact time, amount of work and assessment

Other challenges related to the tools and artefacts of the education leadership learning activity system identified by participants include insufficient contact time during the course work section of the programme and the amount of work and the number of assessment activities that students were required to complete during this section. The challenge of the amount of work and number of assessments required for the modular section of the programme echoes the finding of Chikoko (2010:45) that workload and assessment intensity presented a significant barrier to his master’s students and made success very difficult to achieve.

With specific regard to the assessment strategies and instruments employed during the course work section of the programme, participants reported contradictory experiences, and, as mentioned above (section 3.1.1.7), the opinion that these portfolios contributed positively to their experience of their own education leadership learning was by no means unanimous. While some of the participants reported that they favoured the use of portfolios of evidence as an assessment strategy, others reported that they experienced these portfolios as ineffective and a waste of time. Two participants also reported that they experienced the use of an open book

examination as an assessment strategy in one of the modules as a barrier to their experience of their own education leadership learning.

A number of participants also bemoaned the late and even sometimes absent feedback on their work, both during the course work section of the programme as well as during the research component. This lack of feedback, as well as being demoralising, flies in the face of the tenants of learning theories such as the humanistic learning theory strategy of mastery learning that prescribes that learners should determine the pace of their own learning and should be provided with feedback to allow them to determine the success of their learning (Schunk, 2012:102).

#### 7.2.2.1.5 The use of ICTs as a barrier and challenge

The use of ICTs during the programme, although generally lauded as having made a positive contribution to their experience and perception of their own education leadership learning as well as to their education leadership practice, also posed a challenge to a number of participants. These participants reported that their lack of computer literacy and information and communication technology skills caused them severe anxiety at the beginning of the programme, with some participants reporting that a number of their fellow students had discontinued their studies as a result of this challenge.

#### 7.2.2.2 Rules

As mentioned in Chapter 6, the interview data revealed that the participants experienced no significant barriers to the experience and perception of their education leadership learning from the rules of the education leadership learning activity system.

#### 7.2.2.3 Community

As far as barriers related to their interaction with their fellow students as the community of the education leadership learning activity system is concerned, the participants reported that the distances between the students and also the distance that some had to travel in order to attend contact session on campus made

collaboration and mutual support difficult. This, together with the finding that not enough use was made of or opportunities created *within the programme itself* for interaction and collaboration between and among students, indicates that the community of this particular activity system, in the experience of the participants, was not utilised to its full potential.

#### **7.2.2.4 Division of Labour**

This element of the education leadership learning activity system includes, as mentioned before, all the role players within that system, e.g. the lecturers, the administrators and the supervisors, and for this study participants reported that they experienced their interaction with these role players as having made a positive contribution to their education leadership learning. However, while most participants experienced their interaction with their supervisor as positive, a number of the participants expressed disappointment in the role this functionary played in their education leadership learning experience, with one participant going so far as to state that, if she had had a better supervisor, she would have completed the programme, and another mentioning that she was only able to make progress with and complete the research component of the programme after she had changed to a new supervisor.

### **7.3 The Contribution of the Study**

Because this study focused on the experiences and perceptions of master's students of their own education leadership learning, the contribution of the study will of necessity focus on the findings of the study in this regard. The contribution of this study can be divided into three separate but interrelated parts, namely (1) the confirmation of the fact that the context from within which education leaders enter an education leadership learning programme has an influence on their experience and perception of not only their own learning but also of the contribution such learning makes to their leadership practice, (2) the emergence within education leadership learning programmes of a secondary or incidental curriculum - a curriculum that is not represented by outcomes listed in study guides or university year books, but which plays an important role in both the education leaders' experience and perception of their own learning and on their leadership practice, and (3) the existence of a number

of challenges to effective education leadership learning for effective education leadership practice inherent in a traditional academic master's degree. Each of these aspects of the contribution of the study will be discussed in more detail in the sections that follow.

### **7.3.1 Education Leadership Context, Effective Education Leadership Learning and Learning Theory - Describing the Relationship and its Importance**

As reported earlier in this chapter, the greatest barrier identified by the participants of this study was the fact that, in a number of instances, the curriculum and teaching and learning strategies / instructional applications of the programme failed to acknowledge or take cognisance of their leadership pre-knowledge and leadership experience. This perception also proved to be related to the context from within which participants entered the education leadership learning programme, i.e. those from high quintile, better resourced schools who had probably been exposed to better leadership and management processes and systems and who therefore probably had more exposure to and experience in effective education leadership, reported that, in some instances, both the content of modules and the teaching and learning strategies employed during the programme failed to differentiate between those students with experience and those without.

In terms of learning theory, one of the basic tenants of the learning theory of andragogy which focuses specifically on how adults learn (Tight, 1996:103) is the fact that adults have life experience which they bring with them to each learning situation that they enter or encounter (Tight, 1996:104, Knowles, 1984:11), and this experience, as a rich resource, greatly influences the learning that they do in a new situation or context (Schunk, 2012:245, Hergenhahn & Olson, 2001:47). Indeed, both Schunk (2012:22) and Tight (1996:24) posit that contextualised learning, i.e. learning that takes place from within the real world of the learner, is the most effective kind of learning, while Glatter (2009:226) refers to this personal knowledge and experience and context, which includes "maturity of judgment" (Glatter, 2009:226) as wisdom. Of this context, Walker and Dimmock (2006:125) reported that participants in the SQH valued the fact that the teaching and learning strategies and content of that programme were flexible enough to meet the needs of individual school leaders at their own level and in their own context.

The relationship between education leaders' pre-knowledge and experience of education leadership, the content and teaching and learning strategies of education leadership learning programmes and the application of the tenants of learning theory is therefore a crucial one for the success of education leadership learning programmes. Although this relationship between education leadership pre-knowledge and experience, education leadership learning and learning theory is a vital one for every education system in the world, it is even more and particularly so in a country like South Africa where - for historical political reasons - there exists a wide range of levels and types of education leadership experience and education leadership learning programmes. If, as Bernstein contends, effective school leadership is one of the key aspects currently missing and which therefore contributes largely to the current education crisis in South Africa (Centre for Development and Enterprise Round Table, 2011:2), and if, as Mestry and Grobler (2007:127) contend, it is imperative that South African school leaders possess the skills, knowledge, attitudes and values required for them to be able to lead their schools effectively, then developing education leadership learning programmes that acknowledge and pay more than just lip service to this relations between experience, content and methodology and learning theory must be a priority for all institutions of higher education.

### **7.3.2 The Emergence and Importance of a Secondary of Incidental Curriculum**

From the findings of this study it is clear that from within the education leadership learning programme that served as the activity system, a secondary or incidental curriculum has emerged. The researcher finds it prudent to distinguish here between what could be called the primary curriculum of the education leadership learning activity system (the modules, content and learning activities that are directly related to- and applicable to education leadership) and this secondary or incidental curriculum of that activity system, which consists of content and learning activities that support the primary curriculum or act in support of the primary learning activities, but are not listed or mentioned in the study guide or programme description as outcomes or as part of the purpose of the study.

Although a number of the participants experienced and perceived their exposure to and practice in the use of the internet during the programme as making a positive contribution to their own education leadership learning and to their leadership practice, that contribution must be classified as an incidental one because it is not directly related to education leadership and education leadership learning or the stated outcomes of the programme, but rather entails learning that took place during the performance of activities that support the primary curriculum and learning activities – indeed, such exposure to and practice could be realised in almost any learning activity system that makes use of ICTs. Despite this, the participants' experiences and perceptions regarding their learning and ICTs speaks directly to the changes in the roles and responsibilities of school leaders in recent years, these changed roles now requiring school leaders to be, among other things, “an educational visionary, instructional and curriculum leader, assessment expert, disciplinarian, community builder, public relations and communications expert, budget analyst, (and) facilities manager” (Davis *et al*, 2005:3), with most of these roles requiring some degree of ICT skills and competence.

The researcher would also like to posit that this finding reflects to some degree the diversity of leadership experience and knowledge among leaders not only within the community of this particular learning activity system, but within the context of the South African education system as a whole. In this regard it is interesting to note that those participants who experienced and perceived the use of ICTs as valuable to their education leadership learning (P5, P6, P8 and P11) work predominantly in lower quintile schools (Quintiles 2, 3, 3 and 2 respectively), while those participants who did not report the use of and practice in ICTs as having contributed positively to their education leadership learning – either because it is ‘taken as read’ in their everyday lives and their leadership practice (P1, P15) or because they experienced the use of ICTs in the programme as lacking or not optimal (P4 and P15) or work at either private schools (P15) or at higher quintile public schools (both P1 and P4 work at quintile 5 schools).

As mentioned in Chapter 6 and again earlier in this chapter, quintile 1 schools are among the poorest and most under-resourced schools in South Africa, while quintile 4 and 5 schools are generally well-financed and well-resourced (Motala, 2006:82). It

is therefore fair to assume that school leaders who work in the better resourced quintile 5 schools will have better access to for example the internet and computer hardware and will be expected, by virtue of the fact that the parent community of the school is generally better educated and more affluent than the communities surrounding quintile 1, 2 and 3 schools, to use ICTs as part of their everyday leadership function and practice. It is also fair to assume that school leaders in the better resourced quintile 5 schools or private schools will have experienced to a greater degree the demands of the changing roles and responsibilities of the modern school leader as set out above, which further illustrates the diversity of not only leadership experience, but also of parental and community expectations among and on the school leaders in South Africa. What this means for education leadership learning programmes in South Africa is that such programmes need to recognise all the nuances and subtleties of this diversity in order to build strategies into these programmes that cater for that diversity, not only in relation to the incidental curriculum, but also in relation to the primary curriculum.

### **7.3.3 Describing the Challenges to Education Leadership Learning Inherent in Traditional Academic Master's Degree Programmes**

Although, as reported in 7.2.1.1.3 above, the participants in this study, as students of a traditional academic master's degree programme, experienced a degree of transferability of the theory they learned into their education leadership practice, this transferability, according to the literature in the field of education leadership learning, is by no means common or universal in education leadership learning programmes, whether at undergraduate or postgraduate level (Hale & Moorman, 2003:4, Hess & Kelly, 2005:3).

Such a transfer of theoretical knowledge into practice is also not the only requirement for meaningful and impactful learning though. In chapter 4 of this study the researcher detailed the characteristics and tenants of a number of learning theories, and one of the tenants that most theories of learning have in common is the importance of experiential learning, i.e. learning that takes place either by doing or by being actively part of and involved in a community where that which is to be learned, is practiced. So for example humanistic learning theories such as Vygotsky's Social Development Theory, the Situated Cognition Theory of Brown, Collins and Duguid

and the Situated Learning Theory of Lave (Tight, 1996; Schunk, 2012) and andragogy (Knowles, 1984) all posit that knowledge is gained through personal learning experience rather than just vicariously through the spoken or written words of instructors.

In addition to learning by experience, learners also require opportunities to practice the new skills or to apply the new knowledge in practice (Schunk, 2012:21), while Knowles, in his description of the theory of andragogy, posits that adults approach learning far more practically than children do, and therefore they both expect and require learning to be practical, contextualised and real-life applicable (Knowles, 1984:12).

A third requirement for effective learning that has already been touched on in the discussion of the importance of the context of the learners in an activity system, is the importance of learning that takes place in the real world, i.e. the world that the learner him- or herself inhabits or may inhabit in the future (Schunk, 2012:22, Tight, 1996:24). As mentioned in chapter 4, the context of the learners has two dimensions - the first is that their context is the activity system / education leadership learning programme itself (their context and their community while they are learning) and their context is their own real-life world (the context where they live and work).

Fourthly, learning is a social and collaborative activity best undertaken between and among people (Tight, 1996:21), which ties in with both the importance of context for learning and the idea of having opportunities to practice what has or is to be learned.

It is in the failure of many education leadership learning programmes to take cognisance of and provide for these four learning requirements or conditions for effective learning that lies the downfall of such programmes, and particularly if such programmes are by nature academic and theoretical. The traditional South African master's degree, of which the programme selected as the activity system for this study is one example, is designed "to educate and train researchers who can contribute to knowledge at an advanced level" (Government Gazette No. 36797 of 30 August 2013:72), and therefore appears to ascribe, in its official purpose at least, no importance at all to the transfer of theoretical knowledge into practical skills.

It therefore follows that, in a country where many schools are not delivering the kind of quality education expected by its citizens, where 66% of the school principals have not studied beyond their initial teacher qualifications (Bush & Onduro, 2006:363; Bush & Heystek, 2006:66) and where almost 80% of the public schools are classified as dysfunctional (SAIRR:2008), education leadership learning programmes at both undergraduate and postgraduate level should have as their main focus the improvement of the skills, knowledge, attitudes and values of school leaders to allow them to be able to lead their schools effectively (Mestry and Grobler, 2007:127). Although in South Africa this is provided for at undergraduate level by the ACE:SL programme, it is at the postgraduate level that the challenges to the effectiveness of the traditional academic master's degree outline above, make change in the manner in which postgraduate education leadership learning is provided to school leaders at the proverbial chalk face an urgent necessity.

What the results of this study, with its focus on the experiences and perceptions of postgraduate education leadership learning students of their own learning and on theories of learning, shows, are the challenges and barriers to effective practical leadership learning present in the use of the traditional educational leadership master's degree as professional development for school leaders.

And it is here where the newly promulgated (Government Gazette No. 36797 of 30 August 2013) professional master's degree is likely to fill a void in education leadership learning provision in South Africa that has long had a negative impact on education in general in that country. This degree, in contrast to the traditional academic master's degree which focuses on the creation of knowledgeable researchers, has as its purpose "the education and training of graduates who can contribute to the development of knowledge at an advanced level such that they are prepared for advanced and specialised employment" (Government Gazette No. 36797 of 30 August 2013:71). This purpose statement echoes the definition of a professional degree presented earlier in this thesis, namely that a professional degree "represents a mastery of the subject matter and techniques of a professional field to a (high) stage of competence" and is "directed primarily towards distinguished practical performance" (University of California, Berkeley, 2015). The most notable

difference therefore between the traditional South African master's degree with its strong focus on research and the new professional master's degree is the fact that the latter, although, like the traditional degree, still incorporating an element of research and the creation of knowledge, focuses more specifically on the ability and capacity of the graduate to obtain and be successful at advanced and specialised roles and functions within the employment sector of their chosen field. In the field of education leadership this translates into the difference between a graduate who has a deep theoretical knowledge of the field of education leadership and of the field of research and is therefore able to conduct research in and contribute to the knowledge in the field of education leadership, and the graduate who, with a deep knowledge of the field of education leadership, is also prepared by the completion of the professional degree to work as a specialist educational leader at an advanced level.

## 7.4 Recommendations

From the findings of this study, a number of recommendations can be made. Although it is understood that, by its very nature, the findings of a case study cannot necessarily be generalized to the larger population (Cohen *et al*, 2011:291), the findings of this study as discussed earlier in this chapter suggest certain recommendations with regard to the design and implementation of education leadership learning programmes. These will again be presented within the context of Engeström's (1987:78) Activity Theory.

The finding that the variety and diversity of the participants' leadership contexts and experience - specifically in the case of this study in terms of for example their exposure to ICTs – leads to a difference in their experience and perception of their own education leadership learning and the contribution of that learning to their education leadership confirms the importance ascribed to the context of both *learning* (Schunk, 2012:231, Leonard, 2002:37, Hergenhahn & Olson, 2001:47, Tight, 1996:104, Duffy & Jonassen, 1992:4, Knowles, 1984:11) and *education leadership learning* in the literature (Eacott & Asuga, 2014:930, Christie, 2010:696, Zhang & Brundrett, 2010:154, Lumby *et al*, 2008:3). However, apart from simply confirming the importance of context in learning and specifically in education leadership learning, it

also suggests some recommendations for the varied and diverse South African education leadership environment.

#### **7.4.1 The Purposeful Integration of Learning Theory into Programme Design**

Despite the value and contribution that the participants ascribed to their interaction with the community of the education leadership learning activity system, they reported that the instructional applications as part of the tools and artefacts of the activity system failed to make adequate provision for formal opportunities to collaborate and interact. The researcher therefore recommends that careful and purposeful consideration be given to the integration of appropriate learning theories such as Vygotsky's Social Development Theory (Leonard, 2002:177, Schunk, 2012:242), Brown, Collins and Duguid's Situated Cognition Theory (Leonard, 2002:173), the Situated Learning Theory of Lave (Leonard, 2002:174) and John Knowles' theory of andragogy (Knowles, 1984:6, Leonard, 2002:7, Tight, 1996:103) and their concomitant instructional applications into the design and development of education leadership learning programmes in order to better:

- (a) acknowledge the *social nature* of the activity of learning
- (b) acknowledge the fact that *learning is context-bound and context-dependent*, and
- (c) ensure that sufficient opportunities are created for *collaboration and cooperation*, thus facilitating some of the ways in which adults learn best.

#### **7.4.2 The Adoption of a Case Study and Problem-Solving Approach to Learning**

In view of the experience of some participants – related again to the diversity of contexts and leadership experience - that the modules failed to take into consideration their individual levels of pre-knowledge and leadership experience, the researcher recommends the adoption of a case study and problem-solving approach to education leadership learning. This suggestion entails discarding the traditional modular model of education leadership learning in favour of the use of case studies,

some of which would be carefully and purposefully selected by the academic staff and some of which would be elicited from students from within their own education leadership context. These cases would then be discussed and analysed using a problem-solving approach in order to allow students with varying levels of pre-knowledge and leadership experience to construct new leadership knowledge in collaboration and cooperation with other education leaders in the programme, under the guidance and with the support of the experienced programme facilitators. This approach, whilst acknowledging and even exploiting the variety and diversity of students' education leadership knowledge and experience, also provides for a learning environment and learning situations that speak to the manner in which adults learn best.

#### **7.4.3 Effective Use of the Inverted Classroom Approach**

Considering the finding that although participants valued the collaboration with- and sharing of the learning experience with the community of the learning activity system, they experienced the physical distances between students in this specific programme and between students and the Institution as a challenge to such collaboration and sharing, the researcher recommends greater and more effective use of the inverted or *flipped* classroom approach to education leadership learning. As mentioned in Chapter 6, the inverted or *flipped* classroom entails a classroom where “events that have traditionally taken place inside the classroom now take place outside the classroom and *vice versa*” (Lage *et al*, 2010:32). The researcher recommends therefore that the learning material and content - required for use in the case study and problem-solving approach suggested above for the analyses and discussion of the cases – that is traditionally presented to students during contact session or lectures, be provided to them electronically *before* the contact session or lecture, thus inverting or *flipping* the classroom. By inverting the classroom, this approach frees the facilitators of the programme from the responsibility of simply *delivering content* and creates instead the opportunity for them to *meaningfully guide and support* the students in their learning as they analyse the cases and solve the problems, and in so doing constructing their own new and contextual education leadership knowledge. This learning material and content should:

- (a) be firmly based upon recent research in the field of education leadership
- (b) be designed and/or selected to augment the foundational theoretical knowledge that students may be assumed to have gained from their previous educational leadership learning opportunities which, in the South African context, would be an honours degree in educational leadership together with, in some instances, an ACE:SL
- (c) include basic tools such as problem-solving skills and strategies as well as readings on the topics or spheres of education leadership knowledge indicated in the findings of research on both effective education leadership *learning* and on effective education *leadership* (Bush & Moorosi, 2011:68, Bush, 2012:6), such topics being the theory of education leadership, education law, the finances and financing of education and human resource management in the educational context, and
- (d) support the education leadership theory that provides the foundation or philosophy of the programme.

#### **7.4.4 The Inclusion of ICT Skills Assessment and Appropriate Training as Programme Outcomes**

The use of the approach described above assumes that all the students have (a) access to the internet and (b) a certain minimum level of ICT and computer skills. In order to be implemented meaningfully, the researcher recommends that programmes using this approach should make provision for computer and ICT literacy assessments and for appropriate training for those accepted students who lack the skills to participate in the programme meaningfully.

#### **7.4.5 The Inclusion of Opportunities for Experiential Learning**

Stemming from the debate on the balance between theory and practice and the concept of internships as part of ideal or effective education leadership learning, as well as from value ascribed by the participants in this study to the learning they did from sharing in the experience of others within the community of the activity system,

this recommendation is for the inclusion of opportunities for education leaders to learn experientially while enrolled for education leadership learning programmes. Such experiential learning, facilitated by either leadership practitioners (education leaders ‘*at the chalk face*’, so to speak) or by academics, and could include activities ranging from cohort or individual visits to a wide variety of educational contexts including rural schools, urban schools, private / independent schools, effective schools and dysfunctional schools through to opportunities for students to shadow experienced and / or effective school leaders for a designated period of time or to limited periods of internship or leadership ‘*practicals*’, where students are afforded the opportunity to fill a leadership post and perform the leadership functions of that post for a specific period under the guidance and mentorship of an effective or experienced school leader.

#### **7.4.6 A Professional Degree that Includes a Structured Research Component**

All the recommendations above could be implemented as part of a well-designed professional master’s degree. In support of the argument put forward by Bush and a number of other authors (Bush, 1998, Bush & Jackson, 2002, Bush & Moorosi, 2011) that education leadership learning programmes should ideally be offered at a postgraduate level and in support of the view of Brundrett *et al* (2006:100) that education leadership learning programmes should provide what they refer to as the “theory-research-practice” link, the researcher recommends that education leadership learning programmes should be offered at a master’s level, and should be offered not as purely academic degrees - advanced studies in an academic discipline with an emphasis on theory and knowledge in a specific field rather than for application to professional practices (New York State Education, 2007) - such as the one that served as the education leadership learning activity system for this study, but rather as professional degrees - degrees focusing on the mastery of the subject matter and techniques of a professional field to promote distinguished practical performance - (University of California, Berkeley, 2015) - with the addition of a strong academic and research foundation, so that these degrees may, as posited by Brundrett *et al* (2006:100), reduce leadership conformity and the impact of a one-size-fits-all leadership approach whilst preparing education leaders for their own unique school, social and national situation and context.

In order to accomplish this balance between the professional and academic nature of the degree, designers of education leadership learning programmes would have to:

(a) include in the design the inverted classroom teaching and learning approach (see section 4.3 above)

(b) include the use of instructional applications appropriate to adult learners that also promote learning that balances theory and practice (see section 4.2 above)

(c) include meaningful experiential leadership learning opportunities such as internships or leadership *practicals* (see section 4.5 above), as prescribed by the purpose and characteristics of a professional master's degree recently proclaimed in the HEQSF (Government Gazette No. 36797 of 30 August 2013:72) AND

(d) include, in order to fulfill the requirements of an academic degree and in order to allow graduates to continue to PhD level, a structured research component which includes

(i) *theoretical* teaching and learning opportunities, with the provision of content, the analysis of case studies and conducting of facilitator-guided collaborative problem-solving, as well as

(ii) *practical* teaching and learning opportunities which would entail the planning and conducting of a supervised group or cohort research projects that include both desktop and empirical research and reporting

This recommendation is in line with the recently proclaimed professional master's degree as described earlier in this thesis.

In conclusion, based on the recommendations made above, the researcher proposes, in addition to the ACE:SL programme currently offered at undergraduate

level in South Africa, the following comprehensive new model for contextualised education leadership learning at postgraduate level in South Africa. This model attempts to both build on and / or address the strengths and weaknesses of education leadership learning as they were revealed in this investigation into the experiences and perceptions of master's students of their own education leadership learning while enrolled in a post-graduate degree programme in educational leadership, and to incorporate the features and characteristics of exemplary or ideal education leadership learning as they were revealed during the review of literature conducted for this study. The researcher acknowledges that the findings for this study are not easily generalisable beyond the education leadership learning activity system under the spotlight here, but posits that the findings, when used in conjunction with the features and characteristics of ideal or exemplary education leadership learning, provide a sound foundation for the development of a model appropriate to the unique South African education and education leadership context and environment. In this, the researcher supports the concept of *wise practice* in education leadership learning suggested as an alternative to *best practice* by Walker and Quong (2005:97) - they describe *wise practice* as education leadership learning that is embedded "within the contexts and cultures which frame schools' and leaders' lives" (Walker & Quong, 2005:114), and posit that improving leadership practice in education does not depend on a list of best practices, but rather on a design or model for education leadership learning that is flexible and adaptable to both individuals and situations (Walker & Quong, 2005:115).

This model, depicted graphically in diagram 7.1 below, builds on the features common to exemplary education leadership learning programmes as proposed by Orr (2011:120), namely a clearly defined theory of leadership, a coherent curriculum, the use of active instructional applications or teaching and learning strategies that integrate theory and practice, quality internships that provide education leadership students with the opportunity to apply newly-learned knowledge and skills, knowledgeable presenters, the use of support structures within the programme such as cohorts and finally the use of student- and programme feedback to facilitate continuous improvement of the programme. The model also frames education leadership learning in terms of the elements of Engeström's Activity Theory (1987:78), namely tools and artefacts, rules, community and division of labour.

The model makes provision for a professional degree in education leadership learning with a strong academic and research foundation. The leadership content and topics, as part of a coherence curriculum (Orr, 2011:120) are selected and drawn from current research in the fields of both leadership and learning, and compliment the underpinning instructional (Jacobson, 2011:34, Hallinger, 2010:332, Huber, 2010:673, Southworth, 2002:77) and distributed (Jacobson 2011:35, Leithwood *et al*, 2008:27, Spillane, 2005:143, Davies *et al*, 2005:165) theories of leadership (Orr, 2011:120) that shape the character of the programme.

The model envisages a two (2) year part-time programme - commencing in January each year - that does away with the use of the traditional modular structure of many current programmes and also with the traditional instructor or facilitator-centred teaching and learning approach. It does so by proposing, as active instructional applications or teaching and learning strategies (Orr, 2011:120) a case study and problem-solving-based learning design using a strongly inverted or *flipped* classroom (Lage *et al*, 2010:32) instructional approach.

Students attend one (1) full-day contact session early in January and then two (2) five (5) day full-day contact sessions - presented during the March and July school vacations, during the first year of registration. Each day of the two (2) five (5) full-day contact session is divided into two (2) four (4) hour sessions, with the morning session dedicated to topics and case studies related specifically to education leadership, and the afternoon sessions dedicated to research learning. During these contact sessions, the cohort of between 10 and 15 students, under the guidance and with the support of a group or team of qualified and experienced academics, collaborate in sub-groups to discuss and analyse a mix of both purposefully designed and developed case studies and case studies suggested and developed by the students themselves, in order to solve the problems these case studies present and in so doing, constructing for themselves new education leadership knowledge relevant to and contextualised for each student's individual leadership and life context and situation.

The academic team will prepare a provisional programme or agenda of case studies based on the topics that emerge from the student case studies. Once this draft

programme or agenda has been established, the academic team will select and prepare additional case studies in order to flesh out the learning programme and to ensure that all the outcomes of the programme are addressed.

For the subsequent two (2) five (5) day contact sessions, learners will again be provided with learning and reading material appropriate to the case studies being presented during each contact session, together with instructions and guidance on how to prepare for meaningful participation and interaction during the collaborative learning opportunities to be facilitated at each contact session. As mentioned earlier, each contact session will be facilitated by a team of academics with knowledge and experience or expertise on the situations or problems presented in the case studies. In addition to the education leadership learning, students will also participate, during the second session of each contact session day, in collaborative case study and problem-solving learning opportunities directed towards research and research methodology. The aim of these sessions would be to familiarise students with the theory and practice of research, and to identify, design and plan a collaborative research project within which each student in the cohort would then take responsibility for and conduct empirical research on one (1) aspect.

Conducting the actual empirical research and the production of the research report in the form of a dissertation of limited scope would then take place concomitantly with the leadership *practicals* (Orr, 2011:120) during the course of the cohort's second year of registration. All the students in a cohort will be required to participate in two (2) practical leadership learning activities, namely an observation week and an internship period of three (3) weeks. For the observation visit, each student will be assigned to one (1) of five (5) groups of three (3) students. Each group will then visit and observe, during a pre-arranged week, a variety of different school contexts, after which each group will produce a structured reflection on their leadership learning during these visits.

During the three (3) week internship period, students will be assigned to serve in a leadership role under the guidance and mentorship of both the principal of an effective partner school and also that of an experienced academic. Consideration will

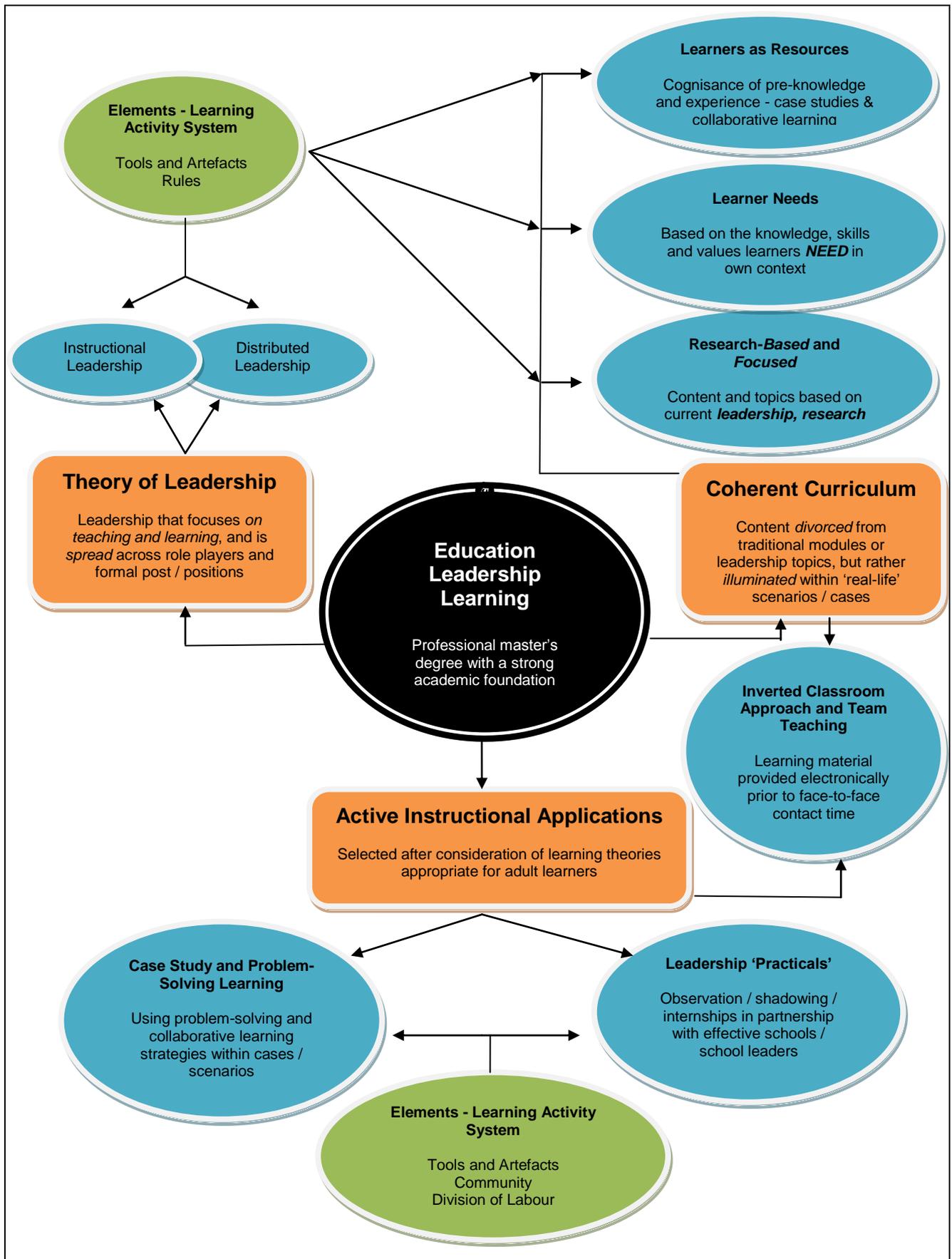


Diagram 7.1: Model for Contextualised South African Education Leadership Learning

be given to the current position, school context and level of leadership experience of each student during the process of allocating internship placements and deciding the leadership functions that each student will perform during his or her individual internship.

This system of observational visits and internships pre-supposes the existence of an extensive network of partnerships between schools and the Institution offering the programme, a feature of what Walker and Dimmock refer to as *real-world learning* (2006:155), and speaks to the global trend in education leadership learning towards partnerships between and among universities and representatives of the education profession at both school and professional organisation level and the emergence of school-based projects and school internships as part of education leadership learning (Huber, 2010:230).

The researcher acknowledges that the practicalities of the proposed practicals or internships will pose a challenge for institutions wishing to include such activities in their education leadership learning programmes.

In summary, the researcher believes that the model proposed and described here meets the criteria for flexibility and adaptability set by situations (Walker & Quong, 2005:115) in that it attempts to meet both the *leadership* and *learning* needs of the vastly diverse South African education leader population, while still providing education leaders who aspire to continue with further academic study the opportunity to do so.

## **7.5 Recommendations for Further Studies**

The researcher posits that findings of this study suggest a number of topics or areas for further investigation.

### **Topic 1 - Theory into Practice**

To what extent do education leadership learning students in South Africa transfer what they learn in education leadership learning programmes to their education leadership practice?

What influence does the measure to which the varying and diverse education leadership contexts in South Africa is considered in an education leadership learning programme, have on the transfer and application of theory into practice?

### **Topic 2 - Throughput and Success**

What factors prevent education leadership learners from successfully completing the programmes they register for?

What are the distinguishing features of education leadership learning programmes with high throughput rates?

What influence does the students' ability to acquire incidental skills such as effective use of ICTs have on the throughput and success rate of education leadership learning programmes?

### **Topic 3 - Implementation of Leadership Theory**

How does the presence of a specific underpinning theory of leadership such as the theory of instructional leadership or transformational leadership influence the manner and extent to which students' are able to transfer their learning to their leadership practice?

What kinds of leadership change does the presence of an underpinning theory of leadership such as instructional or transformational leadership bring about in students' leadership practice?

## Topic 4 - Leadership Internships

How best can leadership internships be included in education leadership learning programmes to form a meaningful part of students' education leadership learning?

How do leadership internships cater for the diverse and varying levels of pre-knowledge and experience of education leadership learning students?

### 7.6 Summary

It is widely acknowledged that school leaders have an impact on the schools they lead (Hale & Moorman, 2003:5, Mestry & Grobler, 2004:128, Riley & Mulford, 2007:87, Crawford & Early, 2011:105), with the results of numerous international studies confirming that school leaders have an influence on both learner achievement and performance and on school effectiveness and school improvement (Finestone & Riehl, 2005:138, Robinson, Lloyd and Rowe, 2008:31, Rhodes & Brundrett, 2009:362, Woods, Woods & Cowie, 2009:253, Zhang & Brundrett, 2010:154, Jacobson, 2010:33, Brauckmann & Pashiardis, 2012:18, Bush, 2012:1). Research has also shown that education leaders who (a) establish goals and expectations, (b) plan and use resources strategically, (c) plan, coordinate and evaluate teaching and the curriculum at their school, (d) promote and participate in staff development and (e) create and maintain a safe and supportive learning environment (Robinson *et al*, 2008:25-30) have the greatest impact on their schools and on the learners at those schools, a finding substantiated by Sammons *et al* (2011:97) who state that effective education leaders and education leadership “promotes an orderly and favourable behavioural climate, positive learner motivation and a learning culture that predicts positive changes in learner behaviour and attendance”. This recognition of the importance of leaders and leadership in education has led to a growing interest among academics and policy makers worldwide in the issue of effective education leadership learning, meaning that the interest in the preparation and development of school leaders that started in the mid '80s (Robertson, 2008:24) has now turned into an international phenomenon (Walker & Dimmock, 2006:127). Indeed, the nature and characteristics of the leadership learning required to produce good leaders and promote good leadership has become

one of the major educational issues in the early years of the new millennium (Bush, 2007:321), and preparing and developing school leaders has become one of the pivotal approaches internationally in the quest for educational reform and the improvement of learner performance and success Orr (2011:2).

This recent increase in international concern among policy-makers and researchers on the nature and characteristics of education leadership learning that contributes most significantly to better school leaders and therefore to school improvement (Orphanos & Orr, 2014:682), together with Crawford and Early's (2011:107) statement that

*“exposure to and participation in leadership development activities may or may not bring about change to individual leaders’ beliefs, values, attitudes and behaviours, and these changes to the individual may or may not lead to changes in the leadership practice and these changes may or may not lead to an improvement in student outcomes.”*

forms the foundation of the problem investigated by this study, because if, in fact, improved education leadership at all levels of an education system contributes to better quality education within that system (Steyn, 2008:889, Robinson *et al*, 2008:637, Orr, 2011:2), then education leadership learning that improves school leaders’ leadership practice is essential for the improvement of education, not only in South Africa, but world-wide. Therefore, the problem that lies at the heart of this study is the fact that international and local literature suggests that education leadership learning programmes and qualifications, although considered vital for the development and improvement of school leaders and school leadership and thus for the improvement of learner and school outcomes and education in general, are not effective in improving the leadership practices of school leaders at the chalk face.

This thesis reports the findings of a study focused on education leadership learning - defined for the purposes of this study as the broader context of all formal, planned, articulated and relevant learning activities and content that take place in or is presented as part of a formal course of study or programme aimed at the expansion of education leaders’ knowledge, capacities and skills in order to increase their

effectiveness as education leaders - as conducted among master's students of an educational leadership programme offered by a South African university. This study, guided by the research question 'What are the experiences and perceptions of master's students enrolled in a master's degree programme in educational leadership of their own education leadership learning?', sought to understand and describe, within the framework of Engeström's Activity Theory (1987:78) as described in Chapter 2, these master's students' experiences and perceptions of their own education leadership learning whilst enrolled in the programme.

With regard to research methodology, Chapter 5 describes this study as a qualitative study that was conducted from within an interpretivist-constructivist research paradigm, using education leadership learning at master's level as a case and semi-structured interviews as the data collection method. The participants, all students enrolled in the classes of 2008, 2009 and 2010 of a master's degree programme in educational leadership at a South African university, were selected purposively because of the likelihood that they would possess the information required to answer the research question.

A review of the literature in the field of education leadership learning was conducted in Chapters 3 and 4. Chapter 3 provided a critical review of the literature on issues such as the reasons why researchers should study this phenomenon and the importance of education leadership learning. Six reasons why it is important for education leaders to be prepared and developed for this very important role were put forward – the emergence of school leadership as a profession in its own right, the increased pressures facing modern school leaders, the greater degree of decentralisation in education, the changing context of education leadership and changes to the nature and role of the school leader and finally the greater awareness of the link between leadership and school effectiveness and education quality. This chapter also reviewed the literature on the ideal level at which education leadership learning should be offered and concluded that, because, as Bush (1998:330) posits, teaching is a graduate profession, education leadership should be conducted at postgraduate or master's level.

Chapter 4, as the second of the chapters to review the literature in the field of education leadership learning, defined the concept of education leadership as the sum of all the purposeful behavior, acts and / or activity of a school leader focused on and directed towards inspiring and motivating all the role players within the school context to effectively and efficiently drive and perform the core business of the school, namely teaching and learning, and the concept of education leadership *learning* as the broader context of all formal, planned, articulated and relevant learning activities and content that take place in or are presented as part of a formal course of study or programme aimed at the expansion of education leaders' knowledge, capacities and skills in order to increase their effectiveness as education leaders. Within the context of these definitions, this chapter reviewed the factors that education leadership learning programme designers should take into consideration when designing such programmes (Smylie *et al*, 2005:139) and also the features of exemplary or ideal education leadership learning programmes (Orr, 2011:120). Chapter 4 then explored the link and relationship between the features of exemplary or ideal education leadership learning and theories of learning, specifically the theory of andragogy as a learning theory that focuses on the manner in which adults learn (Knowles, 1984:12, Tight, 1996:105).

Chapter 6 of this thesis presented the findings of the study. These include the fact that participants experienced and perceived the learning content of the education leadership learning activity system as empowering, applicable to their education leadership practice and a source of improved self- and leadership confidence and an improved leadership identity. The participants also reported that they experienced both their increase in skills with the use of ICTs and the learning material provided for them as a leadership resource, and the instructional applications appropriate to adult learners.

With regard to the rules of the education leadership learning activity system, the participants reported that these boosted their confidence in both their leadership and academic abilities, and created for them a disciplined learning environment where they were able to learn a number of leadership values, including dedication, hard work and setting high standards. Their interaction with the community of the education leadership activity system served as a source of support and motivation,

and widened their perspectives on leadership and on the diversity present in the South African education environment while providing them with opportunities to network.

Finally, participants, in their discussion of their interaction with the division of labour within the education leadership learning activity system, classified the role players within that system as either primary or supplementary role players, with the Institution's administrative staff and study groups in the latter category, and their fellow students, lecturers and supervisors in the former.

Chapter 7, the final chapter of this thesis, presented the discussion of the findings presented in Chapter 6. Chapter 7 also presented the contribution of the study, namely (1) describing the relationship between education leadership context, effective education leadership learning and learning theory, (2) the emergence of a secondary or incidental curriculum from within the primary curriculum that contributed significantly to the participants' experiences and perceptions of their own education leadership learning, and (3) the identification of the problems posed by a traditional master's degree such as the one selected as the activity system for this study for the professional development of school leaders.

Following on from both the findings and the contribution of this study, the researcher makes a number of recommendations for the development of effective education leadership learning programmes.

In conclusion, from the findings of this study the researcher can confirm that, for the development of effective schools within an effective education system, effective education leadership learning is vital, not only here in South Africa, but world-wide. Effective education leadership learning requires a foundation of relevant education leadership (Orr, 2011:120) as well as a sound foundation in learning theory (Knowles, 1984:11, Davies *et al*, 2005:8), a coherent curriculum based on current research in leadership and learning, active and participatory instructional applications or teaching and learning strategies (Orr, 2011:120), meaningful leadership internships or practicals and a team of experienced and knowledgeable academics and education leadership practitioners (Orr, 2011:120).

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## Annexure A

Faculty of Education  
Department of Education Management  
and Policy Studies

Mr/Mrs. ....

P.O Box .....

.....

.....

Dear Sir,

### **PARTICIPATION IN STUDY ON LEADERSHIP LEARNING**

I am currently enrolled for a PhD degree in Education Leadership at the Faculty of Education of the University of Pretoria, where the major requirement for the awarding of this degree is the successful completion of a significant research project in the field of education.

The title of my approved research study is *“Education leadership learning: The experiences and perceptions of master’s students.”*

As this title implies, the study will be concerned with the experiences and perceptions of students of their own education leadership learning in a postgraduate leadership programme, in this case the MEd Education Leadership programme offered by the University of Pretoria (UP). It is therefore my great honour and privilege to be able to invite you as a student or former student of this programme to become a voluntary participant in this research project. Please allow me the opportunity to explain the scope and responsibility of your participation, should you choose to do so.

It is my intention to gather the information I require for this research project by means of semi-structured individual interviews. These individual interviews will commence in February 2014 and should be completed by the end of March of that year. Each interview will not exceed 2 hours, and will be conducted on a date and at a venue and time of your own choice.

I have included here for your information a schedule of the individual interview questions.

The aim of this research project is not to pass judgment on- or to evaluate the MEd Education Leadership programme offered by UP, but rather to paint an accurate picture of how students of the programme experience and perceive their education leadership learning in this postgraduate education leadership learning activity and what contribution, if any, they feel their own leadership learning has made to their education leadership practices.

Please understand that your decision to participate is entirely voluntary and that your choice to participate or not will in no way affect any aspect of your relationship with the University of Pretoria.

Please also be assured that the data gathered during this research study will be treated confidentiality, with not even the University of Pretoria having access to the raw data obtained from the interviews. At no time will you as an individual be mentioned by name or indeed be allowed to be identified by any manner or means whatsoever in the research report.

In order to ensure that you are comfortable with the information you give, you will be provided with a confidential written transcript of your own interview for which you will then be required to provide final approval of both the content and the accuracy of information contained in this documents. You will also be allowed to withdraw from the study at any time without any negative consequences for you personally or for your relationship with the University of Pretoria

At the end of the research study you will be provided with a copy of the research report containing both the findings of the study and recommendations based on these findings made by the researcher. It is hoped that this research will enable recommendations to be made that might contribute to the on-going international debate on the nature of postgraduate education leadership learning.

If you decide to participate in this research study, kindly indicate this by completing and returning to me (by fax or scan-and-email) the consent form to be found on the final page of this invitation.

Thanking you in anticipation.

Yours in service of education,

Eric Eberlein  
Student Researcher

Prof. Rika Joubert  
Supervisor

Contact details:

Tel: (083) 310 4895

Fax: (012) 420 3581

E-mail: [eric.eberlein@up.ac.za](mailto:eric.eberlein@up.ac.za)

## LETTER of INFORMED CONSENT

### VOLUNTARY PARTICIPATION IN THE RESEARCH PROJECT ENTITLED

“Education Leadership Learning: The Experiences and Perceptions of  
Master’s Students”

I, \_\_\_\_\_, hereby  
voluntarily and willingly agree to participate as an individual in the above-  
mentioned study introduced and explained to me by Mr. Eric Eberlein, currently a  
student enrolled for a PhD degree at the University of Pretoria.

I further declare that I understand, as they were explained to me by the  
researcher, the aim, scope, purpose, possible consequences and benefits and  
methods of collecting information proposed by the researcher, as well as the  
means by which the researcher will attempt to ensure the confidentiality and  
integrity of the information he collects.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name and Surname

**Kindly sign, scan and e-mail to Eric Eberlein at [eric.eberlein@up.ac.za](mailto:eric.eberlein@up.ac.za) or  
sign and fax to (012) 420 3581**

**Annexure B****SEMI-STRUCTURED INDIVIDUAL INTERVIEW  
PROTOCOL****‘Education leadership learning: The experiences and perceptions of  
master’s students**

Interviewer: Mr. Eric Eberlein

Study Supervisor: Prof Rika Joubert

**PURPOSE OF THE STUDY**

The aim of this study is to understand the experiences and perceptions of master’s students of their own education leadership learning as students enrolled in a master’s degree programme in educational leadership offered by a South African university.

**SOURCES OF DATA TO BE COLLECTED**

Data will be collected by conducting semi-structured interviews with between 12 and 20 students and or former students of the selected master’s degree programme in educational leadership.

**ASSURANCE OF CONFIDENTIALITY**

All participants are assured that their identity as well as their responses will be regarded as completely confidential at all times and will not be made available to any unauthorized user. The participation of individuals in this study is completely voluntary. Should any participants not wish to continue during the course of the research project, he or she will be free to withdraw at any time. Precautions will be taken to ensure that no participant will be harmed in any way by this research or their participation therein. Every participant will be given an opportunity to verify the transcription of the discussion/ his or her interview.

**DURATION OF INTERVIEW**

This individual interview should take no longer than 2 hours (120 minutes) minutes. Please note that the discussion will be recorded and then transcribed. Every

participant will be given the opportunity to validate the transcription as an accurate reflection of the discussion and of their individual part therein.

### BIOGRAPHICAL AND DEMOGRAPHIC INFORMATION

1. Age: \_\_\_\_\_

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

Year or class: \_\_\_\_\_

Year graduated: \_\_\_\_\_

If not yet graduated, reasons for such:

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2.

Current Post level		School Quintile		Years of experience	
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3.

Professional qualification	
Academic qualification	

## SEMI-STRUCTURED INTERVIEW PROTOCOL

### Education Leadership Learning

#### Activity Theory Element - Tools and Artefacts

1. What was your experience, in general terms, of the learning about education leadership that you experienced during the 6 modules you were required to complete as part of the master's degree programme in educational leadership?

2. What was your experience of your own education leadership learning facilitated by the content of the following modules?

- Leadership and Management of Learning in Education (LBL880)
- Leadership and Management of Human Resources in Education (LBO880)
- Accounting and Financial Management in Education (AFB880)
- Education Law (OWR880)
- Research Methodology (NMQ810)
- Globalisation in Education (OOG810)

3. In terms of your education leadership learning during these modules, which of them, if any, did you find most applicable to your role as an education leader, and why would you say this particular module or modules is applicable to your role as an education leader?

4. What do you perceive the contribution of the education leadership learning that you experienced in the module you just mentioned to be on your practice as an education leader?

5. Which specific values, strategies or skills, if any, that you learned during your participation in these modules do you implement as part of your education leadership practice?

6. Related to your answer to the previous question, give some practical examples of how and when you use the values, strategies and/or skills in your role as an education leader.

7. In your opinion, in which of these modules did the education leadership learning you experienced make the least contribution to your education leadership practice, and why do you feel that the modules you just mentioned made the least contribution to that practice?

8. Which factors, if any, related to the 6 modules you participated in do you think prevented the modules from contributing to your education leadership practice?

9. Do you feel the education leadership learning you experienced during your participation in the modules met your learning needs as an education leader?

10. How did you experience the study material you received for these modules? In your opinion, how did the study material contribute to your education leadership learning?

11. What was your experience of the mode of delivery of these core modules? How, if at all, do you think the mode of delivery of these modules contributed to your education leadership learning?

12. Do you think the modes of delivery or the teaching strategies used were appropriate for adult learners?

13. Do you feel these modes of delivery or teaching strategies met your needs as far as your education leadership learning expectations is concerned?

14. How, if at all, could the mode of delivery or teaching strategies have been improved in order to improve your education leadership learning experience?

15. As a practical measure of your experience of the education leadership learning presented during the course work section of the programme, how much time did you spend on the following aspects of your studies?

- preparation for- and pre-lecture reading
- preparation of assignments/essays/portfolios/presentations
- preparation for examinations or other summative assessment activities

16. When and where did you do the work required of you by the programme?

17. What was your experience of the methods of assessment used in these modules? Which method or methods of assessment were used, and how do you feel these methods of assessment contributed to your education leadership learning experience?

18. Do you feel the marks you attained accurately reflected a) the amount of time and effort you put in b) the degree to which you achieved the outcomes set at the beginning of each module and the course overall?

19. What do you think the contribution information and communication technology (ICT) was to your experience of education leadership learning?

20. How, if at all, did the use of ICT in this programme benefit you in your task as an education leader?

### **Activity Theory Element - Rules**

21. Every programme or course of study functions within or by certain rules and regulations. As a practical indication of the contribution of these rules and regulations to your education leadership learning experience, what were the rules or regulations regarding the following matters, and how did you experience these rules during your participation in the programme?

- Admission to the programme
- Registration
- Lecture attendance
- Qualifying for the examinations
- The submission of assignments
- Communication with the lecturers or the University
- Defending research proposals
- Interviews with lecturers
- Research support attendance

22. In your opinion, how did these rules and regulations impact your education leadership learning?

23. Which traditions or elements of a specific master's degree programme in educational leadership culture ('how we do things here') are you able to identify?

24. How, if at all, did these traditions and/or culture contribute to your own education leadership learning?

### **Activity Theory Element – Community**

25. How did you experience your interaction with the other students enrolled in the programme?

26. What impact, if any, did your interaction with the other students enrolled in the programme have on?

- your education leadership learning during the course of the programme
- your experience of the programme in general
- your education leadership practice

27. How did you experience your interaction with the other students of your cohort in terms of the value this interaction added to your education leadership learning? Give examples of what you mean.

### **Activity Theory Element - Division of Effort**

28. In your opinion, what specific role or roles did the following person or persons play in your education leadership learning during your participation in the programme:

- administrative staff
- fellow students
- lecturers
- study groups

- supervisors

29. Of the persons or groups mentioned above, which do you feel had made the greatest contribution to your education leadership learning, and why?

30. Generally speaking, how would you describe the contribution of your education leadership learning during this programme to your overall practice as a leader? Please give examples and elaborate.

31. Which elements of the programme, if any, do you feel contribute the most to your education leadership learning? Please be specific and elaborate.

32. Which elements of the programme, if any, do you feel limited the contribution this programme made to your education leadership learning and your education leadership practice? Please be specific and elaborate.

33. How, in your opinion, could the programme be adapted to improve the impact it has on the leadership practice of future students? Be specific and give details.

## Annexure C

Eric Eberlein  
Student Number  
04314964

P.O. Box 2096  
Faerie Glen  
0042

05 November 2012

Prof. Irma Eloff  
Dean of the Faculty of Education  
University of Pretoria

Dear Prof Eloff,

### **PERMISSION TO CONDUCT RESEARCH WITHIN THE FACULTY OF EDUCATION**

On behalf of myself and my supervisor, Prof. Rika Joubert, I hereby respectfully request permission to conduct, at the Education Faculty of the University of Pretoria, the research required for the awarding of a PhD degree in education leadership.

The title of my approved study is “Does Leadership and Management Learning Count? The Experiences and Perceptions of Postgraduate Students”, and as the title implies, the study aims to explore the experiences of postgraduate students of a postgraduate education leadership and management programme of their own participation in programme and to foreground their perceptions of the contribution, if any, this programme has made to their own leadership and management practice.

With your permission, the postgraduate leadership and management programme at the core of this study will be the MEd Leadership degree being offered in the Faculty’s Department of Education Management and Policy Studies. It is essential at this juncture to indicate clearly that the study does not plan to *evaluate* the MEd

Leadership programme as such, but rather to investigate and understand the experiences and perceptions of students of its value to them and its contribution, if any, to their own leadership and management practice. I have included herewith a complete copy of my approved research proposal for your attention.

It is my intention to identify, from their UP student records and on the basis of their academic performance, between 16 and 20 current and former MEd Leadership students for participation in this study. In this regard I undertake to treat all student records to which I may be granted access as confidential, and to not use whatever access I may be granted to such record for any purposes other than the identification of possible participants.

These participants, once they have agreed in writing to participate in the study, will then be the subjects of focus group interviews as well as individual semi-structured as part of the data collection process.

Although I will be willing, if required, to travel to venues or locations more convenient for the participants, I hope to conduct the fieldwork for this study primarily in venues here on the University's Groenkloof campus. Currently planning is for this study to run from February 2013 to July 2013, by which time I hope to have completed the data gathering process.

Because of the fact that I am employed as a lecturer in among others the MEd Leadership programme which is to be the focus of this study, I undertake to constantly remind myself of the specific role I am to play for the duration of this study, i.e. that of a researcher, uninvolved, unbiased and fair, and not that of a lecturer or employee with a hidden agenda or who appears to have vested interests in the outcome of the study he is completing. I am acutely aware of the fact that I will be conducting research within the institution that employs me AND within the programme that I myself completed and that am now involved in as a lecturer. I am also aware that these factors may contribute to a perception of biasness either in favour of- or against both the University and the programme, and will counter-act this potential for and appearance of bias by reporting the data truthfully as it is collected

and also by basing any conclusions and recommendations strictly on the data as collected.

I further undertake to ensure by all means at my disposal that the best interests of both the participants and those of the University are served at all times and in every phase of the study. This will be facilitated by ensuring that at every phase all role players and stakeholders know exactly what is expected of them and what they can and should in turn expect from me as the researcher. This will be done by meticulous record-keeping and in this regard I undertake to keep accurate records of all my research activities with the use of a research diary.

Should permission be granted by your office, I will add that permission to the required ethical clearance application that is currently being prepared for this study.

I thank you in advance for your consideration of this request. I am available at any time should you require any further details or information.

Proudly a servant in education,

Eric Eberlein  
PhD Student

Prof Rika Joubert  
Supervisor

Cell no: 083 3104 895

## Annexure D