PROPHETS AND PROFITS

A case study of the restructuring of Jewish community schools in Johannesburg – South Africa

by

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Summary

This is a case study of the restructuring of the Jewish community schools in Johannesburg, South Africa. The purpose of this research is to explain why, how and with what impact, economic and ideological forces shaped the restructuring of the Jewish community schools. This is explored by drawing out the views of the different stakeholders as well as the meanings that they attached to the change and by recalling their experiences and understandings *vis-à-vis* the restructuring process.

This study investigates what was considered to be the "first stage" of restructuring – a stage that aimed at ejecting the past, establishing new management and designing a blueprint for the future. The study follows the process as it evolved from April 2001 when a CEO was contracted to manage the schools until March 2003 with the 27th National Conference of the South African Board of Jewish Education, at which the changes were endorsed and constitutionalised.

The study suggests that the restructuring evolved through the interaction and convergence of two globalised forces: one force pulled the schools towards marketisation and managerialism; and the other force pushed the schools towards the intensification of their religious identity. The study explores the impact of these two sets of dynamics as they came together in the context of a faith-based community school, and the contradictory forces that were set in motion. The main argument is that the synergy created between new managerialism and religious extremism, in a transitional and unstable context, undermined the fragile democracy of the faith-based community schools and caused them to change, thus shifting them towards ghettoisation, exclusion and autocracy. The study identifies and explains the global, national, local and institutional conditions and realities that enabled and constrained this process.

This qualitative case study relies on insider accounts of the process of change and contestation, and raises important methodological and ethical questions around the difficulties of researching one's own community and colleagues.

Key words: market-led restructuring; globalisation; faith-based community schools; new managerialism; Jewish education; educational change.

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Prologue

In April 2001 a Chief Executive Officer (CEO) was unexpectedly brought in to replace the Director of the South African Board of Jewish Education (SABJE) (henceforth the Board). The objective of this action was to save the Board and the schools it controlled – the King David (KD) Schools² – from their latest financial crisis; it had emerged that the Board's overdraft at the end of December 2000 stood at R19.5 million.³ This 'bold plan' was put in place at the initiative of the chairperson and the vice-chairperson of the Board, an anonymous entrepreneur and the Chief Rabbi and was supported by unidentified 'top brains and talents in the Jewish community - from business, the law, fundraising and philanthropy'. The CEO's brief, arrangements and plans were not revealed except for the fact that he would be given a free hand in all financial and educational matters.⁵ There is evidence to suggest that in addition to a market-related salary the CEO would receive a performance-based bonus, directly linked to the debt reduction achieved. The only stipulation was that the ethos of the schools should remain intact. The expectations were that if the schools were to be managed like a modern business, better and sustainable structures should be put in place and the organisation would become "lean and mean". A sense of relief spread throughout the community accompanied, however, by many concerns and rumours regarding the CEO's secretive engagement and agenda.

Following the employment of the CEO, almost every aspect of the system was subject to rapid change. A new accounting system estimated the actual debt to be R37,400,323.⁶ In order to settle the debt, the CEO advocated business principles.

¹ This Prologue is intended to be a brief description of the main events in the restructuring of the Jewish community schools. It does not intend to be comprehensive. For a detailed account of the Board or the schools see Chapter 3. See glossary for Jewish terminology.

² The King David (KD) Schools comprise eight schools across three separate campuses in Johannesburg. The biggest campus is in the suburb of Linksfield in the eastern region of Johannesburg (KDL). The campus consists of four separate schools – a nursery school, a junior school, a primary school and a high school. The second campus is situated in the western suburb of Victory Park (KDVP). It comprises a nursery school, a primary school and a high school. A third primary school is situated in the northern suburb of Sandton (KDS).

³ Minutes of the Executive Committee meeting, 6 February 2001.

⁴ Mammoth plan to save King David Schools has been put in place. *SA Jewish Report*, 1 June 2001. One of the community leaders who was identified in that article later denied any involvement.

⁵ Minutes of the Executive Committee meeting, 24 April 2001.

⁶ SABJE, Annual financial statement for the year ended 31 December 2001. Auditors – Grant Thornton Kessel Feinstein.

employing the rhetoric of efficiency, cost cutting, better services, responsiveness to consumers, accountability and improvement of standards. Under the banner of decentralisation, the professional members of the Board were retrenched. This was followed by the rationalisation of the schools' activities and staff. Teachers were retrenched; those who remained were required to work "more for less" and their privileges, such as long leave and reduced school fees, were cut back. The rationalisation also narrowed and diluted the academic input. In that process, class teaching was replaced with subject teaching in selected grades; art, drama and music specialists were cut back; Zulu lessons were stopped; library budgets were cut; educational outings and outsourced programmes were minimised; and professional development for teachers was minimised, if not nullified. The restructuring also affected the community services that the schools had historically provided, including remedial and social services, subsidies for needy families and outreach programmes to disadvantaged communities. Moreover, new rules and regulations were introduced, the sole aim of which was to cut expenses and to have strict control over expenditures and wastage.

At the same time that educational services were cut back, the Board invested in capital expenditure, focusing mainly on the visible exterior of the schools, while paying less attention to the classrooms or educational facilities.

In addition to the financial/economic strand, the restructuring also aimed at intensifying the religious base of the schools along stricter Orthodox lines. For this purpose the status of Jewish Studies (religious education) was elevated while the teaching of the Hebrew Language (secular/nationalistic education) was marginalised. There was a significant increase in the number of religious leaders and Jewish Studies teachers at the schools and their activities were centralised at Board level, while the coordination of Hebrew was devolved from the Board to the schools and the number of teachers, as well as lessons, was reduced.

Feelings of uncertainty, fear and suspicion prevailed at the schools, intensified by rumours and gossip. The CEO and his supporters mostly denied the stakeholders' protests that the changes were implemented in an autocratic manner, without consultation or transparency. There was a feeling among certain stakeholders that the restructuring was based on a deep contempt for teachers and principals and for the

past achievements of the schools.⁷ The harshness of the restructuring was justified by the severity of the crisis it attempted to overcome. The emotional reaction of the teachers to the process was dismissed as resistance to change.⁸

Resistance was bound to occur. One strand of resistance came from the primary schools' Hebrew departments, who turned to the teachers' union to negotiate their changed conditions. Another strong reaction came from the executives and principal of one high school (KDL) who objected to the CEO's condescending and demeaning manner.¹⁰ A lay member of the Board complained about being "in the dark" about the purpose of the restructuring and about general feelings of disempowerment and lack of accountability. 11 Subsequently, the Parent-Teacher Association (PTA) at all the schools became a forum for discussion, where parents demanded information while principals were neither able nor allowed to answer them. One primary school established a parent forum to discuss the changes with the Board and to demand accountability; 12 however, this forum was dispersed by the end of the year owing to a lack of unity among its members and frustration at the futility of their efforts. At the same time rumours were spreading regarding the possible closure of one campus (Victory Park), which due to demographic changes seemed to have a decreased enrolment. These rumours were reinforced by the perceived lack of capital expenditure by the Board at that campus and the exclusion of their pupils from a tour to Israel.¹³ This motivated the principal of the high school and parents at the Victory Park campus to sign a petition demanding that the Board provide assurances that the school would not be closed. The only assurance given was that no decision had been taken to close the campus. 14 The defiant principal was threatened with disciplinary action.

The school community had become polarised. There were those who perceived the CEO as a genius and those who saw him as a villain. Stakeholders were divided between those who believed that the changes would destroy the schools and

⁷ There cannot be school system improvement without the teachers. SA Jewish Report, 15 June 2001.

⁸ New CEO for SABJE. *Davidian Star*, July 2001.

⁹ Correspondence between the National Union of Educators and the CEO, October–November 2001.

¹⁰ Letter from the executive staff of King David High School Linksfield to the chairman, 23 May 2001.

¹¹ Letter from an honorary executive to the chairman of the Board, 28 June 2001.

¹² Minutes of a special meeting of the parents' forum of King David Primary School Linksfield held on Thursday 13 September 2001.

¹³ Why exclude King David Victory Park? and Dear Mr Zulberg. *SA Jewish Report*, 2–9 November 2001.

¹⁴ Letter from the CEO, 14 November 2001.

their ethos, and those who maintained that there was "no choice" and that the CEO was the only person fit for the mammoth task of rescuing the schools. The CEO marginalised those who complained and praised those who complied. At that stage, most resistance was directed towards the manner in which changes were implemented rather than at their essence. It was understood that tough measures should be taken in a time of crisis and some pain would be unavoidable for the survival of the community schools.

The year 2002 began with relative calm, but conflicts soon emerged following the CEO's decisions to end the traditional *Bat-Mitzvah* ceremony for Grade 7 girls, ¹⁵ to change the schools uniform, and to dismiss without notice the deputy principal of one school, replacing her with a man of his choice without adhering to proper labour law procedures. The resistance was intensified when the CEO tried to limit the PTA to a fundraising body in charge only of the library, school magazine and tuck shop. He advised that 'no meetings should be held between the PTA and teachers to discuss the running of the school'. ¹⁶

In June 2002, the CEO announced his decision to establish a middle school (Grades 7-9) at the larger campus (Linksfield) in January 2003 in order to improve educational provision at the schools. Parents were notified about the decision, while the school staff had no knowledge regarding the new school they were expected to set up in a mere five months. By then there was a growing realisation that there was an ideological strand in addition to a managerial/economic strand to the restructuring. It was rumoured that there was a hidden agenda to divide the school into separate girls' and boys' schools. The evidence suggests that the introduction of a middle school initially aimed at breaking the power of the executives at Linksfield High who were blamed for inciting pupils against the new school uniform. The clash between the executives and the CEO was further intensified when the CEO introduced the concept of "cost to company" and decided to equalise the salary scale. This resulted in a minimum to zero increase for those with high salaries (such as the executives), while those at the bottom of the scale would receive a substantial raise. The executives and the principals objected to these measures. The executives threatened resignation and the parents were compelled to act. The PTAs at Linksfield (both primary and high)

¹⁵ Letter to all parents of King David Primary Schools from the CEO, 4 February 2002. For background to the notion of Bat-Mitzvah see glossary.

¹⁶ Letter from the CEO to all King David PTA chairmen, 12 March 2002.

¹⁷ Memorandum to all members of staff from the CEO, 30 January 2002.

empowered a parents' sub-committee to represent them. But the primary school soon withdrew when the chairlady of the PTA decided to cooperate with the CEO. The sub-committee laid out parents' concerns about corporate governance and advised the board that they were seeking a legal opinion on the constitution and power of the Board to institute changes. It requested an undertaking that no steps be taken in the interim period before legal opinion was obtained. Consequently, the executives received their salary increases and the decision to create a middle school was postponed until proper investigation and consultation took place.

At the same time discussions were held at Board level regarding the closure of the Victory Park campus. At that time the campus had an enrolment of about 900 children. There was a tendency to change the rhetoric of "closure" and to speak rather about "relocating" the school to the Sandton area, which only had a primary school. The CEO announced that consultations would begin shortly with Sandton parents as to the need to establish a high school in that area.¹⁹

The Victory Park community formed an action group in order to ensure the survival of the campus, which had implications pertaining to the broader Jewish community in that area. The group included lawyers, accountants and rabbis representing the synagogues in the area. There was suspicion that the envisaged closure was not based only on financial reasoning but also on ideological grounds since the Victory Park parents seemed to be more liberal-minded people, some of whom wished to open the schools to gentile pupils. The intended closure of the campus was perceived as social engineering aimed at moving the Jews out of the western suburbs towards the eastern and northern suburbs of Johannesburg; two centres of greater religiosity. No amount of reassurance could dispel parents' concerns at that stage. There was a strong feeling that the CEO could not be trusted and that parents had lost confidence in the Board and the CEO. It was suggested that an independent Jewish school should be established 'that is not bound by the narrow perspective of the Board of Education and offers a more diverse and relevant Jewish education to our children'. The possibility of running the campus as an independent

¹⁸ Letter to all King David Linksfield High School parents, 18 June 2002.

¹⁹ Restructuring King David Schools, Undated letter from the CEO sent to all parents (June 2002).

²⁰ King David VP Primary School, *School Survey*, April 2001. In that survey a third of parents unequivocally supported the opening up of the school. One-third was opposed to it and another third supported it conditionally.

²¹ Victory Park Community Action Group, minutes of meeting held on Wednesday, 19 June 2002.

²² Email sent to all members of the Victory Park Action Group, 28 June 2002.

school was discussed at the PTA meetings. The Board denied any intention to close the campus and parents were accused of reacting to unfounded rumours.²³ By August 2002, the Board had issued a letter confirming that the Victory Park campus was not closing and that they would not take any decision concerning a high school in Sandton without proper consultation with all stakeholders.²⁴

An atmosphere of mistrust and animosity had spread throughout the school community. Teacher and parent morale was at its lowest ebb. With all the opposition to the CEO there was a constant feeling that he was one step ahead in every negotiation and that he had informants reporting to him on any private or public discussion. Teachers were advised that through their continuous complaints they had been spreading negative messages about the schools. They were warned that those discussions would eventually result in children leaving the schools and a further loss of positions. A regime of silence prevailed whereby school staff became afraid of expressing any negative opinions. Some honorary officers openly opposed the CEO and were accused of discrediting the Board. It was maintained that approaches by stakeholders to the CEO to discuss their fears and concerns were met with hostility and the threat of legal action. Those who resisted were accused of pursuing some ulterior motives to discredit the CEO or other Board executives. Those who supported the CEO, including the Chief Rabbi, certain community leaders, bankers, donors, as well as many middle-class parents who were attracted to the market rhetoric and to the CEO's charisma, watched in silence as the schools' reputation, achievements, ethos and teachers were belittled by the CEO. Some might not have approved of the CEO privately, but supported him publicly. Some stakeholders supported the ideological restructuring, described by the CEO as a process of "re-Jew-venation", 25 others supported the economic benefits and some believed that there was "no other alternative". But when the relationships became so tense and parents and teachers began to consider other alternatives, the CEO was told that he had until the end of the year to settle the schools and to get the staff on his side.

In response, the CEO and his supporters became engaged in a process of damage control. Towards the end of August 2002 the CEO addressed each campus. His speech included a professional and impressive Power-Point presentation showing

²³ Letter from the Victory Park Community Action Group to the SABJE, 18 July 2002.

²⁴ Letter from the SABJE, 1 August 2002.

²⁵ The CEO's address at the Gauteng conference of the South African Jewish Board of Deputies, 20 October 2002.

a remarkable financial recovery. The debt was down to R20 million. The schools were divided into separate cost centres and their financial positions were compared. No explanations were given as to how the savings had been achieved, and how much was recovered through donations. Promises of transparency and consultation were given. Teachers were praised. Since it was the period leading up to the Day of Atonement, ²⁶ the CEO begged forgiveness from those he had offended and granted forgiveness to those who had offended him. He finished his lengthy speech with a picture of the temple in Jerusalem, reminding parents that the Second Temple was destroyed because of "groundless hatred" (sin'at chinam) between Jews. He expressed his hope for the building of the Third Temple soon. At the end of each presentation the chairman or an ex-chairman of the Board praised the CEO and his "fantastic" achievements. No questions were allowed, unless presented beforehand to the CEO. Emotions were high. Many parents were impressed with the CEO's seeming control of the schools' financial and educational concerns, while many others were resentful. A mini-riot took place at the Victory Park campus in which most, if not all, of the parents were involved, expressing their sense of anger and disempowerment.²⁷

To reconcile the relationship between the CEO and the schools' management, a supportive private bank donated the time of its top international human resources facilitator to sort out what was diagnosed as a communication problem and to introduce a corporate culture into the schools. The bank supported a weekend-long *bosberaad*, focusing on team building and refining the schools' mission and outcomes. This resulted in school management becoming more accepting of the CEO's style of management and more hopeful in reaching some form of mutual coexistence. They were mostly appreciative of the opportunity to be heard by the CEO. Gifts as well as letters of gratitude were sent to the participants.

"Road shows" were conducted to regain the loyalty of the school staff. The CEO handed out gifts to teachers during CEO-staff luncheons, in gratitude for their hard work and loyalty to the "company". Managers were asked to prepare "shopping lists" for their schools.

While some stakeholders viewed these changes with relief and sincere hope that the CEO had realised his managerial mistakes and was consequently mending his

²⁶ See Glossary.

²⁷ Correspondence via email among members of Victory Park Community Action Group, 13 September 2002

²⁸ Strategic meeting.

ways, others watched on with suspicion. The common expression used was that "a leopard does not change its spots, it only rearranges them". Behind the scenes, at Board level, the CEO, the chairman and his vice-chairman were preparing themselves for the Board conference due to take place in March 2003, whereby new honorary officers would be elected. Parents, reacting to the imposed changes and based on their awareness of the requirements of corporate governance, began to investigate the role of the Board and demanded to know how decisions were being made, who was making them, and how representatives were elected. There was a strong call to change the Board's constitution and give parents more control over the schools.²⁹ It seems that in order to keep the school community in a state of relative calm, the CEO was instructed not to institute any further changes till after the election.

By the beginning of 2003, it appeared that the first phase of the restructuring was concluded.³⁰ The CEO had entrenched himself and was firmly in command. Parents won some battles and lost others, but they did not create a sustainable, unified body beyond the short-term action committees. School staff were mostly exhausted and apathetic. Most teachers retreated into the classroom and lost interest in the broader aspects of the schools. Victory Park campus enrolment was at an all-time low, as people began believing that its closure was imminent.

In January that year the CEO sent a letter to stakeholders informing them of major successes in all areas, those that required improvement such as finance, and those that were always perceived as successful, such as students' achievements in the matriculation examinations:

The pupils excelled in their matriculation examinations ... This achievement must be seen as a confirmation of the success of the transformation at our schools. I do not think that I have to spell this out in more detail.³¹

The CEO described other 'major/superb/resounding successes'³² often using the pronoun "I", thereby implying that all the schools' achievements were attributable to him. Most notable successes were the Gala Evening that replaced the traditional *Bat-Mitzvah* ceremony, the new school uniform, the capital improvement and new computers, and the saving of the Victory Park campus from closure. Teachers viewed

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²⁹ Rethinking the constitution of the SABJE, constitution sub-committee, 14 February 2003; Special parent forum meeting on amending the constitution of the SABJE, 1 December 2002; Project Revive, 4 November 2002.

³⁰ Community leader, 28 January 2003. [Document 60:1 (26). Codes: Understanding - financial].

³¹ From the desk of the [CEO], 20 January 2003.

³² Ibid.

the above statements with growing scepticism and submission. The principals also resigned themselves to being dictated to and focused on delivering an obedient staff. It helped that three out of the six principals were close to or at retirement age, since any insubordination would mean an early departure for them.

The first few months of 2003 were uneventful except for a short episode when the CEO forbade a secular/Zionist youth movement from entering the schools, owing to an argument he had had with the movement's leaders regarding their level of religiosity and practice.³³ While his behaviour enraged many stakeholders and was justified by others, some of the school staff were relieved that he was focusing on the youth movement and was leaving them alone. There was another unsuccessful attempt by the CEO to change the PTA's constitution and to limit the power of the parents.³⁴

The 27th Conference of the South African Board of Jewish Education, held in March 2003, was another successful event for the CEO and his supporters. A significant financial improvement was announced and an impressive video portraying an idealised picture of the schools generated positive feelings among the participants. In a shrewd manoeuvre supported by the rabbinical establishment,³⁵ the CEO was able to get rid of any defiant honorary officers of the Board and to ensure the election of new members. In a letter sent to the mostly first-time Ultra Orthodox voters – who were recruited specifically for that conference from the *shtibls*³⁶ that had sprouted up in Johannesburg in the 1990s – the names of the new candidates were circulated and voters were advised that those 'will form the winning team...' as they 'are positive to our cause (Orthodox)'.³⁷ Moreover the voters were asked 'to support the insertion of the words Orthodox and Zionist into the objects of the Board'. They were told that 'if the opponents try to put [forward] any proposal to try and scrap this or refer it to a committee for further consultation, please oppose their proposal'.

After a heated debate the amendment to the constitution was adopted. For the religious leaders, Jewish education needed to clarify its mission so it could fight doubt and confusion. For the more liberal participants, this narrow definition would send a

³³ *Habonim Dror* squares up to Allan Zulberg and Zulberg responds to *Habonim's* complaints. *SA Jewish Report*, 17–24 January 2003.

³⁴ Letters from the CEO to parents, dated 3 March 2003 and 6 March 2003.

³⁵ An urgent message to all *Chaverim* from Rabbi Yossi Goldman, Chairman of the SA Rabbinical Association. Undated.

³⁶ Shtibls are small, independent congregations. They are not linked to the main synagogues and cater to the more observant sectors in the community. See Chapter 3 for more on the subject.

³⁷ Unsigned and undated letter distributed to each participant during the 27th conference of the SABJE.

message of exclusion to those Jews who are not strictly Orthodox. The elections and the constitutional change were described by a liberal ex-Board member as a 'travesty of democracy'. 38

The community was polarised. Parents were divided between: those who could not see any fault in managing schools along business lines – which had resulted in the "miraculous" financial recovery (the debt was down to R18 million by then and there was an operating surplus); those who felt that the ethos of the schools was in jeopardy; and those who were apathetic and disinterested and just wanted to buy enough time until their children graduated from the schools.

Teachers and principals were divided along the line of those who supported the CEO, those who feared him or saw their advancement as being dependent on their compliance, and those who opposed him.

Yet while the community was divided, the rabbinical establishment was 'gratified by the improvement in recent times regarding standards of observance in the King David Schools ... the South Africa Rabbinical Association, together with the Office of Chief Rabbi, pledge its support to King David Schools in the ongoing pursuits of these noble ideals'. ³⁹



This narrative leaves many questions unanswered: Why was the Board in such a financial crisis? Why was there no community support to the schools during this financial crisis? Why was the employment of the CEO shrouded in secrecy and anonymity? Why did the Chief Rabbi and other community leaders support the harsh restructuring in spite of the human and educational costs? What was the meaning of the constitutional change and why was it so important? And most significantly – How and why such control over the community could be exerted and sustained?

The narrative also raises broader theoretical concerns, such as: How was this restructuring of the Jewish community schools related to the educational and social transformation in South Africa? How do existing theories of change make sense of the restructuring process? To what extent had the managerial/economic imperative of the restructuring complemented its ideological strand, and to what extent were they

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³⁸ Heated debate over proposed changes to KD constitution. SA Jewish Report, 11–18 April 2003.

³⁹ Rabbis respond to Pres Mbeki's challenge. SA Jewish Report, 19–26 September 2003.

conflicted? The narrative also interrogates the "black box" that is called "community", and points to questions about power and control. What constitutes a community school? Does the "community" take precedence over the parents with regard to the education of their children?

On a personal note, the restructuring of the Jewish community schools affected me professionally. I had worked at the schools and at the Board for 15 years in different academic and managerial positions - the last being that of Hebrew Studies coordinator and as a professional officer of the Board, mostly in charge of curriculum and teachers' professional development. The new CEO did not consider this position to be core and I was retrenched in December 2001.⁴⁰ I had started my Doctoral studies in the Department of Education Policy and Management at Pretoria University a year before. The restructuring of the Jewish community schools was thus a critical event through which I was able to explore changes in education and the management of change.

This extended narrative lays the basis for what will constitute both a personal account of the change - informed by the emotional challenges of educational change (Beatty, 2001) - as well as a broader empirical account of restructuring at the Johannesburg Jewish community schools and its theoretical location in the global literature on educational change.

Postscript

I concluded the fieldwork for this research after the Board conference of March 2003, but this was not the end of the story. On 19 September 2003, amid much controversy regarding the establishment of middle schools at all campuses, the CEO was suspended. His suspension was announced by the chairperson in the local Jewish newspaper. 41 No details were given. A few days later - and after the CEO had threatened the Board with a civil suit and court proceedings⁴² – another statement appeared in the community newspaper. It was announced that since the CEO had attained the financial objectives of the restructuring 'much sooner than had originally been anticipated, [the Board and the CEO] have reached agreement on [the CEO's]

⁴⁰ Proposed restructuring of the SABJE. Letter from the CEO, 22 June 2001.

⁴¹ *SA Jewish Report*, 19–26 September 2003. ⁴² *SA Jewish Report*, 26 September–3 October 2003.

early departure from the SABJE'.43 The newspaper was indirectly blamed for providing the initial incorrect information. It was later announced that the CEO had received 'significant remuneration and incentives' the amount of which would not be disclosed, 'suffice to say that most of the somewhat exaggerated rumours concerning the amount involved are highly inaccurate'.44 It was "confirmed" via rumours and speculation that the CEO received several million rand, thereby becoming the single major beneficiary (financially) of the restructuring of the Jewish community schools.

 ⁴³ SA Jewish Report, 10–17 October 2003.
 44 Draft letter to parents, written by the chairperson and an honorary life president, November 2003.