

## Chapter 1

### Filling in the blanks

The restructuring of educational institutions based on market principles has since the 1980s increasingly become a common practice in many countries (Daun, 2002; Deem, 1998; Boyd & Lugg, 1998; Hargreaves, 1994), including South Africa (Fleisch 2002; De Clercq, 1997; Chisholm, 1997).

Market-led restructuring tends to be associated with a set of techniques, values and practices that has come to be referred to as “new managerialism”. This concept rests on two distinct claims about educational change: one, *‘that efficient management can solve almost any problem’*; and two, that *‘practices that are appropriate for the conduct of corporate enterprises can also be applied to the public sector’* such as education (Rees & Rodley, 1995:15). Both claims have been debated and criticised in the educational research literature (Wallace & Pocklington, 2002; Apple, 2001; Fullan, 2001; Rees & Rodley, 1995).

The shift towards a market-led restructuring of educational institutions seems to be a by-product of a fundamental shift in the nature of the global economy (one aspect of globalisation), as well as the tendency to promote neoliberal philosophy in Western society, with its emphasis on the efficient management of resources (Hargreaves, 2003; Carnoy & Rhotem, 2002; Barber, 2001; Bottery, 2000; Marginson, 1999; Wells et al, 1998; Boyd, 1992). In this context, schools are increasingly positioning themselves in the consumer–product discourse of new managerialism with its attendant emphasis on efficiency, decentralisation, accountability and performance.

Another by-product of globalisation has been the resurgence of ethnic and religious identities and attachments (Hargreaves, 2003; Carnoy & Rhotem, 2002; Barber, 2001).

Recent research has pointed to community schools as the redemptive solution to the marketisation of schooling because of their predisposition to build trust, belonging and loyalty among their members (Strike, 2000; Beck & Foster, 1999; Hargreaves, 1997; Grace, 1997; Sergiovanni, 1994; Etzioni, 1993). However, some scholars caution educationalists to be aware of the “dark side” of communities; that is, their tendencies for parochialism, exclusivity, intolerance and coercion (Bottery, 2000; Strike, 2000; Sennet, 1998; Noddings, 1996). Noddings (ibid) gave the example

of morally questionable groups, such as gangs and fundamentalist religions, which often abuse the notion and the language of communities.

At face value, religiously affiliated schools fit well with the ideal notion of community by virtue of their being built on the principles of shared understanding or common tradition, dominant goals and practices (Strike, 2000; Arthur & Bailey, 2000). This implies that faith-based community schools could be well positioned to counter the perils of the global economy. There is, however, hardly any research testing this assumption. In the growing literature of globalisation and education, the role of religion is generally ignored (Grace, 2003). Grace (2002) challenges the '*secret garden of Catholic education research*' by exploring the dilemmas that Catholic schools face in an increasingly secular and consumer-driven culture. Apple (2001; 2000a; 1998) analyses the tense alliance of contradictory forces that have impacted on public education in the United States and the United Kingdom, namely: the *neo-liberals* who are committed to markets, choice and privatisation; the *neo-conservatives* who yearn for strong state control and a return to traditional knowledge and values; the *authoritarian populist religious fundamentalists* who are concerned about secularisation and want to return to (their) God; and a faction of the professional and managerial *new middle class* who may not totally agree with the other three, but are dependent on them for professional advancement. This latter group supplies the technical knowledge for the alliance; that is, the notions of accountability, efficiency and management procedures. While Grace (2002) examines the impact of managerialism and secularism on the spiritual and religious mission of Catholic schools, and Apple (2001; 2000a; 1998) examines the working of the power bloc that has increasingly turned educational policies towards the "right" way, this study expands the context of inquiry by exploring the nature of the synergy between managerialism and religion and its impact on the broader social and cultural fabric of faith-based community schools.

The backdrop to this inquiry is the restructuring of eight Jewish day schools in Johannesburg that are under the control of the South African Board of Jewish Education (the Board). The restructuring process evolved through the interaction and convergence of the two globalised forces mentioned above: the market and managerialism, expressed in the notion that "schools should be run like a business"; and the intensification of religious and community identity. The study explores the impact of these two sets of dynamics on faith-based community schools. The main

thesis is that new managerialism undermined the schools' sense of community while creating synergy with the religious base of the schools – and was thus able to impose changes that could ultimately shift the schools further to the “right”. A central tenet of this research is the global and local conditions; the pretexts and the processes that facilitated and inhibited this synergy.

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. Chronologically, the restructuring began towards the end of 2000 when a consultant was contracted to investigate the system, and ended in March 2003 with the 27<sup>th</sup> National Conference of the South African Board of Jewish Education, at which the changes were endorsed and constitutionalised. The study follows the process as it evolved. It trails the interplay between the two main discourses that dominated the restructuring: economic/managerial; and religious intensification. It interrogates and contrasts the perceptions and understandings of the different stakeholder groups within the community as to why, how and with what impact the restructuring occurred. It also questions their ability and/or willingness to participate in the process. Accordingly, this study is guided by three central research questions:

- What factors (external and internal) led to the restructuring process?
- How did the restructuring process unfold and what factors shaped its implementation?
- How did various stakeholders understand and experience the restructuring process?

This study is based on numerous observations of public and private meetings, on in-depth interviews with 72 stakeholders, on countless casual conversations and on the analysis of numerous documents including letters, reports, notices, minutes of meetings, newspaper articles, advertisements, etc. It is also my recollection and interpretation of the change process based on knowledge gained from 22 years of association with the Board as a teacher, parent and manager.

The meaning that I assign to the data is framed by two sources which comprise my identity as a researcher – the theoretical and the personal. Theoretically, I based my critical analysis on a conceptual framework developed in this dissertation based

on the dichotomy between “managerial culture” and “community culture”. An additional theoretical lens was provided by Fullan’s (2001a; 2001) view of educational change as complex, chaotic and unpredictable. This contradicts and challenges the linearity of new managerialism as a change process and its disregard for context, culture as well as the agency of stakeholders.

The personal meaning that I assign to the data is framed by my “centre-left” approach to religion and politics. In terms of religion this means that for me Judaism is a culture (based on religion) rather than strict religion. In practical terms this means that although I do not adhere to many of the religious rituals, I do follow the main traditions and prefer that my neighbourhood synagogue – which I only visit on rare occasions – be Orthodox.<sup>1</sup> Based on my liberal approach, however, I acknowledge that there are other ways in which Judaism can be practiced, such as Reform Judaism<sup>2</sup> or Ultra Orthodoxy.<sup>3</sup> Yet I resist the imposition of any single belief system as the only true, authentic way of practicing religion.

My approach has been shaped by my love for Jewish culture and the Hebrew language, by my Israeli upbringing, and by my South African background – where I have lived most of my adult life with my South African partner; where I brought up my three children as South African Jews; and where I had to learn that being a Jew in South Africa is different to being a Jew in Israel. Growing up as a secular/traditional Jew in Tel-Aviv, I did not have to think about whether my children would remain Jewish, nor did I have to define being Jewish – an identity which I always took for granted based on the secular/Zionist education that I received during those idealistic, early years of the State of Israel. However, while I predominantly adopt a “centre-left” worldview, current events – especially the perceived growth of anti-Semitism, the seeming failure of the peace process in the Middle East with the outbreak of the *al Aqsa* Intifada at the end of September 2000, the events of 9/11 and the war in Iraq – make it difficult to distinguish the “left” from the “right”.

Critical theorists maintain that educational systems come to provide the site of struggle over the meaning and power of identity and culture, which have been eroded by cultural globalisation and the weakening of nation states (Marginson, 1999; Wells et al, 1998). In view of this I shall argue that after all is said and done, the

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<sup>1</sup> See Glossary.

<sup>2</sup> See Glossary.

<sup>3</sup> See Glossary.

restructuring of the Jewish community schools was another arena in which the perennial conflicts of the Jewish nation were played out, revolving around the core issue of: Who is a Jew? I will argue that the managerial restructuring was an attempt to impose a narrow extremist solution to the on-going conflicts between Judaism and Zionism, religion and democracy, and Orthodoxy and Reform Judaism. Controlling the schools meant having dominance over the “common sense” of the Jewish community thus shaping its Jewish identity. This study expounds how these dilemmas and conflicts have impacted on the daily life of the community and have shaped the restructuring of its education system, and itself.

### ***Rationale***

How do existing theories of change make sense of this specific instance of educational change? And, what can this study contribute to the wider literature on educational change?

While research has pointed to community schools as being predisposed to counteracting the negative consequences of globalisation and managerialism, Noddings (1996) appeals to educators to look at both good and bad examples of community so as to make an educated decision about their schools, and thereby avoid falling into the “dark side” of communities:

We ought to be cautious also in pushing for collective goals and demanding a collective identity. Even if we stand for something that makes us exclusive ... we can still insist that our most fundamental attribute is a commitment to respond to the needs of others and to appreciate their difference. We can work hard to avoid the community of terror. Such a community ... uses continual coercion. Often in the name of equality, it presses for uniformity, common aspirations ... and the repression of difference (1996:267).

This case study of the Jewish community schools’ restructuring offers one example of such a community school complex and investigates under what conditions it might become an inclusive and democratic organisation, and what conditions might produce the opposite effect.

The literature suggests that the confrontation between “community school cultures” and “managerial cultures” creates tension, conflict and contestation, but also collaboration and compromise. Consequently, a new culture emerges; a culture that attempts to hold together two very different sets of values and principles. This dual existence is referred to as a kind of “bilingualism” – where both cultures and values

co-exist and are invoked in an appropriate context (Gewirtz et al, 1995), or a type of “hybridisation” (Reed, 2001). In some cases, the new culture sits uncomfortably on top of the old and exacerbates dysfunctional tendencies within the social relations of the organisation (Menter et al, 1997). It is therefore suggested that:

... the way in which sectoral, organisational and personal leadership factors interact to produce new cultural, organisational and managerial forms in particular contexts should be a major question for research and policy debate over the coming years (Simkins, 2000).

While there is a small body of research that explores ideological and conceptual aspects of such interaction (Foley & Grace, 2001; Strike, 1999; Sergiovanni, 1994), there is, however, no empirical record or understanding of how this tension unfolds in terms of stakeholders’ experiences and their interrelationships. Moreover, there is not enough conceptual or empirical clarification on how faith interacts with this new educational hybrid and how it impacts on both the managerial and the communal aspects.

This case study sheds light on how the tensions between marketisation, community values and religion unfolded in the particular context of Jewish community schools in Johannesburg, the backdrop to which is South Africa’s transformation to democracy. The inherent conflict that exists between community values and new managerialism is particularly pronounced in this context as, on the one hand, there are forces in the wider society that pull these schools towards democracy and the construction of a national identity based on inclusivity and tolerance, while, on the other hand, the schools are facing economic and identity crises which seem to lead to a narrowing of its borders and exclusiveness, as well as to economising on the community services offered. In addition, the schools have to resolve these issues in the context of a dwindling community that is struggling with feelings of loss and insecurity – as many of its members and potential leaders have emigrated – whereas the broader local and global Jewish context is also perceived as being unstable and precarious. It is important, therefore, to examine these political, ideological, economic and socio-cultural processes, as well as to explore how the interaction between them affects the services that the schools provide to the community.

In the South African context, there is no research that explores the impact of new managerialism on schools and their stakeholders. There is a growing body of

research on school improvement in South Africa, which emphasises the need for a strong management ethos and accountability in educational institutions, without sufficient attention to the tensions that modes of new managerialism create (Taylor, 2002). Furthermore, there is no qualitative research on independent schools in South Africa after 1994, and only a few studies were undertaken prior to that, such as Christie (1990) and Muller (1992). There are some recent studies on the sector of independent schooling, such as Du Toit (2002), which is a quantitative study that mainly discusses the size, profile and growth of the sector, as well as Hofmeyr and Lee (2003), who also provide a snapshot of the sector and the general problems facing independent schooling in South Africa.

The same lack of relevant research applies to studies on change in Jewish education in South Africa. The only investigation since 1994 is a Masters dissertation at the University of Natal, which explores the attitudes of the Jewish community towards the educational transition that took place at Carmel College, a Jewish day school in Durban. It narrowly focuses on the management of a Jewish school in a multicultural environment and the impact that the inclusion of gentile pupils had on the curriculum (Workman, 1997). There are a significant number of articles as well as a few academic papers and dissertations dealing with Jewish education in South Africa<sup>4</sup> but there is no critical analysis of the educational institutions. Most of the papers tend to be opinions on selected issues<sup>5</sup> or legitimate accounts of the “achievements in spite of the challenges” told by those who were involved in Jewish education.<sup>6</sup> Little attention has been given to the voices of other stakeholders.<sup>7</sup> It is evident that these writings do not necessarily provide a comprehensive multifaceted view of the Jewish educational system.

The lack of research in Jewish education in South Africa corresponds to the global paucity of critical research on religious education. This is referred to by Grace as secular marginalisation which resulted in the ‘*general neglect of the faith-based dimension of any major issue under investigation*’ (2003:150). Grace perceives this neglect to be partly the result of the uneasy relation that exists between faith and reason – and by extension, faith and research – since research can produce results that are disturbing to the faithful and are therefore discouraged by religious authorities.

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<sup>4</sup> See Belling (1997) for comprehensive bibliography.

<sup>5</sup> See for example Casper, 1972.

<sup>6</sup> See for example Kopolowitz, 1997/8.

<sup>7</sup> There are a few exceptions, such as Workman, 1997; Herman, 1998; 1989; Kark, 1972.



There are, however, a few exceptions such as Bryk et al (1993), Valins et al (2001) and Grace (2002).

On a more personal note, given my long professional association with the schools, I realised that there were many problems which the previous bureau-professional<sup>8</sup> management could not solve, and many issues – whether financial, ideological or educational – that needed to be changed. The restructuring was a significant event that provided me with the opportunity to explore the impact of a different type of management and to investigate whether a new managerialist type of governance – and the market-based ideologies that underlie it – in fact change schools into more productive and efficient institutions. The study therefore allowed me to reflect, share and enrich my own understanding of the change process and to contrast it with other stakeholders' perspectives, as well as with the research literature. This point is taken by Apple who investigated the changes caused by the forces of conservative modernisation:

While lamentable, the changes that are occurring present an exceptional opportunity for critical investigation. Here, I am not speaking of merely the accumulation of studies to promote the academic careers of researchers, although the accumulation of serious studies is not unimportant. Rather I am suggesting that in a time of radical social and educational change it is crucial to document the processes and effects of the various and sometimes contradictory elements of the forces of conservative modernisation and of the ways in which they are mediated, compromised with, accepted, used in different ways by different groups for their own purposes and/or struggled over in the policies and practices of people's daily educational lives (2001a:105).

### *Dissertation structure*

The Prologue provides the reader with a panoramic view of the restructuring process under investigation, while this chapter presents the theoretical argument and the rationale for the study. This chapter also positions the empirical inquiry within the research literature on globalisation, managerialism and community.

Chapter 2 develops the conceptual argument presented in Chapter 1 and seeks to lay bare the workings of globalisation and its expression in the restructuring of schools. It unpacks and analyses the two dialectical global processes that have impacted on educational institutions and society at large: the force towards marketisation and new managerialism; and the parallel force towards the strengthening of community values and identity. My thesis is that the two parallel

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<sup>8</sup> See Chapter 2.



discourses – managerialism and community – contradict and complement each other. The affinity between them, however, tends to push the discourse towards what has been described as the “dark side” of the community – its parochialism, exclusivity and the creation of the “other”.

The local expression of global forces is dependent on national and institutional conditions and realities. Chapter 3 therefore provides the ideological (Judaism and Zionism), national (South African), local (Jewish community) and institutional (Jewish community schools) contexts of the restructuring. It identifies three main areas of conflict that affected the local and global Jewish community, and by extension its educational system. These are the tensions between religion and democracy, Zionism and Judaism, and Orthodoxy and Reform Judaism. The unique South African context provides a distinctive local interpretation of these dynamics. This chapter describes how these conflicts were expressed in the context of the Jewish community schools, which were at the same time facing chronic financial and managerial dilemmas. I argue that while prior to 1994, South African society encouraged the Zionist/national character of the community and the schools, the transition to democracy, as well as the forging of a new national identity, supported a reconstruction of identity based on religion.

Chapter 4 explores the challenges, opportunities, limitations and tensions of being both an insider and an outsider while researching a current change process in a small community. In particular it examines methodological concerns and ethical issues as well as the role of emotions in conducting this kind of research.

Chapters 5 to 7 present and analyse the findings of this inquiry. Chapter 5 explores the different understandings and perceptions among stakeholders as to why and how the restructuring of the Jewish day schools occurred. The lived experiences of the stakeholders provide a means of capturing the complexity of the process and clarifying the different levels of meaning that the change held for them. Throughout this chapter I point out the interplay between the ideological and the economic/managerial restructuring, and highlight the apparent synergy that existed between these two discourses. I end Chapter 5 with a vignette that follows the disjointed implementation of what was primarily an ideologically-driven change process that was imposed on the school community and was adhered to despite its illogical conclusion.

In Chapter 6 I further follow the two main discourses of the restructuring – the economic and the ideological – and explore how they interacted in the complex terrain of the Jewish community schools. These processes are viewed through the lens of new managerialism and its claims on efficiency, decentralisation, goal setting and accountability. This chapter highlights some main policy initiatives that impacted on the schools, especially those that exemplified the tensions between democracy and religion, Zionism and Judaism, and Orthodoxy and Reform Judaism. This chapter explores how the process impacted on teachers and parents and how their initial consent to the restructuring process was transformed – owing to the autocratic mode of change – into anger, frustration, lack of trust and ultimately into sheer rejection. I end Chapter 6 with a vignette that describes the counterforce that the change process created and which found expression in resistance to the middle school policy, and in the eventual departure of the CEO.

Chapter 7 explores the global, national and local conditions that supported the autocratic mode of change as described in Chapter 5 and 6. It attempts to explain the support given to the restructuring from the financial and religious power bloc in the community, in spite of the apparent educational and human costs. I argue that the change can be explained as a cultural shift, whereby the majority middle-of-the-road has lost its dominance to the Ultra Orthodox minority. The chapter suggests that even though the CEO has now gone, it remains to be seen whether other alternatives would be sought for the organisation, or whether the Jewish community schools will continue to follow the managerialist solution.

Chapter 8 theorises how and why an inevitable process of change went awry. It attempts to explain the findings in the light of the conceptual framework explicated in Chapter 2, and explores how the tensions between managerial culture and community culture played themselves out in the restructuring of the Jewish community schools. The lessons gleaned could deepen our understanding of the international literature on school reform, specifically on new managerialism as a change process and on the likelihood that faith-based community schools could counteract the perils of globalisation and managerialism. I suggest 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.