PROPHETS AND PROFITS

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

by

Chaya Herman

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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).[1] The objective of this action was to save the Board and the schools it controlled – the King David (KD) Schools[2] – 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'.*[4] 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,

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[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.[9] 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

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[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"[17] 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)

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[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.[18] 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.[20] 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.[21] 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'*.[22] The possibility of running the campus as an independent

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[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

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[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*,[28] 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 co-existence. 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

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[26] See Glossary.
[27] Correspondence via email among members of Victory Park Community Action Group, 13 September 2002.
[28] Strategic meeting.

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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

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[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]

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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 proceedings[42] – 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]*

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[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.

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

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

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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 27th 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.[1] Based on my liberal approach, however, I acknowledge that there are other ways in which Judaism can be practiced, such as Reform Judaism[2] or Ultra Orthodoxy.[3] 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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[1] See Glossary.
[2] See Glossary.
[3] 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[4] but there is no critical analysis of the educational institutions. Most of the papers tend to be opinions on selected issues[5] or legitimate accounts of the "achievements in spite of the challenges" told by those who were involved in Jewish education.[6] Little attention has been given to the voices of other stakeholders.[7] 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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[4] See Belling (1997) for comprehensive bibliography.
[5] See for example Casper, 1972.
[6] See for example Kopolowitz, 1997/8.
[7] 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[8] 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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[8] 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.

Chapter 2
Globalisation, managerialism and communities

What does globalisation have to do with the restructuring of the Jewish community schools in South Africa? The simple answer is – everything. The deeper meaning of each term of this dissertation's title can only be understood by viewing it through the lens of globalisation. The *restructuring* of educational systems worldwide has been affected by a combination of global economic restructuring and reduced social spending; both manifestations of neo-liberal thinking or what might be called the ideologies of the market (Ball, 1998). The *Jewish* religion, like any other religion, goes beyond national borders and time. Jews have always had to deal with the reality of global dispersion and with the complexity of maintaining their identity as a minority group (Sacks, 2003). *Communities* have been created and reinforced so as to resist the homogeneous tendencies of globalisation and to provide a voice for diverse social groups (Marginson, 1999). And lastly, global processes and macroeconomics are widely implicated in the social and educational policy context in *South Africa* after 1994 (Jansen, 2001b; Sayed, 2001; Donaldson, 1997).

To explore the restructuring of the Jewish community schools through the narrow lens of organisational change or micropolitics, without paying attention to the globalised context within which the change occurs, will therefore only provide a limited account of the process. However, this statement needs to be qualified further. First, I do not claim that globalisation by itself can explain the restructuring or that a direct link between globalisation and my inquiry can be established. I merely suggest, like Dale (1999:8), Bottery (2000:1) and Taylor et al (1997:54), that the researcher has to understand the nature of globalisation in order to explore how some of its ideological discourses have been translated and interpreted in a specific setting. Second, acknowledging the existence of global processes does not translate into adopting a determinist approach to restructuring. It is evident that all nations – and institutions, for that matter – do not respond in the same way to globalisation, and that the specific interpretation of globalised processes depends on local and institutional capacities and histories as well as on political, social and economic conditions (Carnoy & Rhoten, 2002; Taylor et al, 1997). It is for this reason that researchers usually point to the global–local axis as an important concept for those who research

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changes in educational institutions in the new globalised order (Welch, 2001; Deem, 2001; Fitzsimons, 2000; Marginson, 1999).

Accordingly, the aim of this chapter is to develop a conceptual argument that seeks to lay bare the workings of globalisation and its expression in the restructuring of schools. This conceptual analysis is based on both a re-description and reinterpretation of the literature. My thesis is that local and global influences have led the restructuring of the Jewish community schools in two opposing directions: the economic/managerial force that pulls the institution towards greater efficiency, cost reduction and the application of other business principles to the management of the schools; and the community/religious force that aims at strengthening the community values and the religious character of the schools. Each route comprises a distinct discourse that sometimes complements and sometimes contradicts the other, thereby promoting contradictory and paradoxical practices within the context of faith-based community schools. My assumption is that in this context the schools will have to confront two key challenges: first, how to become financially viable in the new neo-liberal economy without compromising their mission and values; and second, how to preserve the community and religious values without narrowing its borders and augmenting its exclusivity.

In order to pursue this conceptualisation I will begin by exploring the notion of economic and cultural globalisation, their inherent contradictions, their envisaged gains as well as their perils, and their impact on education and society in general. I will argue that these global processes have unleashed two parallel, yet seemingly contradictory, processes: the one that pulls schools towards new managerialism and the strictures of the market, and another that pushes schools toward communitarianism. In my analysis I will critically discuss the first process, namely the market-led restructuring of educational institutions and the attendant practices and ideology of new managerialism. Special attention will be given to the impact of new managerialism and marketisation on selective stakeholders of education, that is, principals, teachers and parents. This will be followed with a critical analysis of the second process – the resurgence of communities, including religious communities – and their complex nature. I will use the conceptual tool of *gesellschaft* (society) and *gemeinschaft* (community) to explore how communities function and how they adapt to marketisation and globalisation. In this context I will explore the notion of faith-based community schools, their "good" and their "bad". Lastly, based on this

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conceptual analysis and on my argument that both processes have interacted in the restructuring of the Jewish community schools, I will construct a polarised framework that will demonstrate the conflictual tenets of both new managerialism and the liberal notion of community. This exposition will provide the platform for broader theorising about the origin and nature of the restructuring process, its intended and unintended consequences, as well as the experiences of the stakeholders in this process.

Conceptions of globalisation

Globalisation is usually referred to as linkages and interconnections between states, and the creation of a world system. We are now part of a new global economy in which productivity and competitiveness are based on knowledge and information, and where most jobs are influenced by what happens both globally and locally (Castells, 2001). Globalisation is not only an economic process. It also refers to other processes such as the political, cultural, sociological, semiotic, linguistic, etc. (Marginson, 1999). The scope and intensity of these interlinking processes are challenged in the literature (Welch, 2001; Rizvi & Lingard, 2000). The notion that they exist and have impacted on almost every facet of political, economic and social life across the globe is, however, mostly uncontested (Dale, 1999; Marginson, 1999; Wells et al, 1998).

It is not my intention to dwell on the notion of globalisation and all its complexity, but rather to isolate some of its paradoxical and contradictory processes that might shed light on the restructuring of the Jewish community schools. For this purpose I will focus on two main processes and their relation to education, namely, economic and cultural globalisation.

Economic globalisation

As an economic process, globalisation is associated with the restructuring of the nation state in terms of deregulation of financial controls, the diminishing of national borders coupled with the increase in transnational interactions, the opening of markets and notions of efficiency, the selective globalisation of science and technology, the flexibility of labour and the interconnectedness of the economy through networks (Castells, 2001).

Economic globalisation is also associated with the spread of neoliberalism that is perceived to maximise economic efficiency and to guarantee individual freedom. It is believed that the free hand of the market will ensure a more efficient world

economy and will improve the material conditions of people across the globe (Wells et al, 1998). Neoliberalism symbolises a move from Fordist economies based on protected national markets to neo-Fordism in which global competition encourages corporate downsizing, cost cutting and flexibility, which reduces wages and curtails the power of unions. It further stimulates entrepreneurship and the move towards the flexible production of goods using a workforce of part time, temporary and contractual employees.

The perils of economic globalisation

Supporters of globalisation often speak about its potential for democratising and enriching our lives by providing access to markets, cultural practices, employment opportunities and products as never before. Yet the mass demonstrations and the violent expressions against globalisation across the world indicate that not all humanity is benefiting from globalisation, and that it creates a binary divide between those who are able to enjoy the new globalised economic order and those who are its victims (Hargreaves, 2003; Rizvi & Lingard, 2000).

Significantly, globalisation has a negative impact on those who economically benefit from its existence and who are able to participate in this "knowledge society", mainly because it demands flexibility and adaptability to unpredictable changes. The unintended consequences of the knowledge society are job insecurity, job-hopping, job redundancy, pension insecurity, the collapse of welfare safety nets and the erosion of supportive communities and relationships (Hargreaves, 2003; Bottery, 2000). Taking part and "winning" in the global economy therefore creates anxieties and uncertainties. These are defined as "manufactured uncertainties", to distinguish them from those uncertainties and risks that are created by nature (Giddens, 1999). Uncertainties are sometimes perceived as a political choice created by governments who trade off security for the encouragement of free choice (Hargreaves, 2003).

The greatest threat of globalisation is perceived to be its impact on the fundamentals of human character, described as the "corrosion of character" (Sennett, 1998). In the new globalised order individuals experience personal and social insecurities, coupled with the growing threat of crime and violence to their physical and mental safety. This affects the individual's basic capacity to trust others and to establish meaningful relationships. Furthermore, the need to secure employment in times of rapid change creates a "society of suspicious minds" where people,

motivated by personal interest and competition, spend their lives looking over their shoulders (Hargreaves, 2003). Words like loyalty, mutual commitment, long term goals and delayed gratification do not ensure success in the global market. This economic context puts pressure on families, especially on the parental role model, since the same short-term adaptive behaviour that earns workers success in the modern workplace, impacts negatively on their family life that requires long-term commitment, obligation, trustworthiness and purpose (Sennett, 1998).

Notably, globalisation is an especially threatening phenomenon to the middle class who feel insecure and uncertain by the shrinking of the public sector (Brown, 1990) and by the tearing up of societal maintained safety nets (Bauman, 2001). Middle-class parents are becoming increasingly concerned about their "imagined future" and those of their children who are now under threat to find jobs in both the old and new professions and in management positions (Ball, 1998). It is perceived that these uncertainties promote parents as consumers of education to seek the competitive edge at the expense of others, and to look for value-added education. Information technology is increasingly seen as the best value to add to their children's education (Bigun & Kenway, 1998; Kenway et al, 1993).

Economic globalisation and education

Economic globalisation has spurred various processes in education. First, neoliberalism advocates that education, like any other social service, should be turned over to competitive market forces. This leads to the privatisation of educational systems, decentralisation, greater parental choice as well as greater competition between schools for "clients" – all antithetical to the classic notion of the welfare state as the provider of education. It is assumed that through the market, schools would become more efficient and more effective (Chubb & Moe, 1990). More specifically, it has been recommended that schools should be restructured in line with corporate structures so they can compete in the knowledge society (Schlechty, 1991).

Second, globalisation exerts pressure on educational systems to develop the knowledge and skills of their pupils in order to compete in the global market, especially information technologies (Hargreaves, 2003; Bigun & Kenway, 1998; Hargreaves, 1994). This requires schools to alter their curricular and mode of teaching in order to accommodate the flexible specialisation required by the new production techniques. It requires education systems to enhance students' outcomes in

employment-related skills and competencies and to create higher goals and standards. The knowledge society has changed the traditional conception of what is knowledge, and schools are expected to enable pupils to construct knowledge drawing on a range of information, to review it from different perspectives, to criticise and improve on it and to apply it to new situations (Bereiter & Scardamalia, 1998). Yet, it is observed that while globalisation has affected education at a macro level, it has not changed much at a classroom level. It is perceived that even in those countries that are involved in the global economy and that occasionally use computers in the classroom, both teaching methods and curricular remain largely unchanged (Carnoy, 2002).

Third, it is claimed by some theorists – referred to as *realists* (Wells et al, 1998) or *sceptics* (Tikly, 2001) – that even though national borders have become more porous and the power of global corporations has increased, nation states do not lose their power or essential role. Most people remain nationalised and are still attached to the places where they live. It is therefore argued (Green quoted in Wells et al, 1998) that while many nation states reduced their control over certain areas of education by privatisation, decentralisation and budget cuts, the control has been reinstated by various mechanisms such as national curricular and tests linked to performance-based funding and other accountability measures for quality assurance. Performativity is therefore perceived to be another form of indirect steering, or steering at a distance, which replaces intervention and prescription with target setting and accountability (Ball, 1998).

Fourth, global and economic changes led governments to question the funding and organisation of public services. This advanced the ideology and techniques of new managerialism as a replacement to the bureaucratic organisational regimes of schools. New managerialism is a concept that aims to explain and describe the new discourse of management, derived from the private, for-profit sector, whose introduction to the public sphere was enthused by the search for efficiency, excellence and effectiveness (Deem, 2001). New managerialism involves new forms of employee involvement, in particular the promotion of a "corporate culture" in which managers seek to capture both the minds and hearts of employees in order to achieve the ends that they desire (Ball, 1998; Hatcher, 1994). In the wake of globalisation new managerialism becomes both a governance system and a vehicle for educational change.

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Cultural globalisation

Globalisation, viewed as a social and cultural process, has transformed the world culture and has stimulated a homogenised consumer culture in which people everywhere use the same technologies, eat the same food, wear the same clothing, speak the same language and are exposed to the same media images. This universalised style has been captured in the ironic phrase – the McDonaldisation of society (Ritzer, 1993).

Paradoxically, increased cultural homogeneity occurs simultaneously with increased cultural heterogeneity. Cultural diversity is created either by local or national reconstruction of the global messages, or by the struggle of some marginalised groups to assert their own cultural values – which themselves could be global, such as religious fundamentalism or feminism (Carnoy & Rothen, 2002). Moreover, the negative fallout from economic globalisation leads many of those who cannot share its benefits to turn inwards towards culture, religion or ethnicity as an alternative source of meaning (Hargreaves, 2003). This paradox of globalisation is the topic of Benjamin Barber's book *Jihad vs. McWorld* (2001). On the one hand, the distribution of products such as MTV, McDonald's and Reebok create a homogenous global theme park which Barber calls McWorld (describing any sterile cultural monism, for which America is not solely responsible), and on the other hand, it creates balkanised nation states and raging cultural fundamentalism which he calls Jihad (not necessarily Islam). In contrast to Huntington[1] who views the struggle as a clash between two civilisations (West against the rest), Barber perceives it as a dialectical expression of tension built into a single global civilisation, where the emergence of ethnic and religious divisions are actually created and propagated by McWorld and its modern media and communication technologies.

As society becomes simultaneously more fragmented and more homogenised, as nation states relinquish part of their control and national identity, and as big corporations have established new global structures, the national and individual identities are in a continuous process of being dislocated, displaced or recreated. In the new global order identities are no longer perceived as unitary or essential – but rather as fluid and shifting. New, instant identities are being created based on

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[1] Huntington, S.P. The age of Muslim wars. *Newsweek*, December 2001–February 2002. Special Davos Edition.

forgetting rather than remembering the past; we can now choose the identity we want (Bauman, 2001). This has been described as the "crisis of identity"; a consequence of not only globalisation but also of the changing theoretical landscape, in particular the rise of postmodern uncertainties (Hall, 1992). The theoretical essence of postmodernity, and more generally of post structuralism, is succinctly summed up by Hartley (1997) based on the writings of Lyotard, Derrida and others:

> First, there are few taboos left … Anything goes … Few would now defend the grand ideas of modernity. Democracy is not seen as a cause worth fighting for, unless there are vested economic or political interests …

> Second, this is an age of risk and uncertainty … Even the certainties of science seem uncertain. … Many of the big stories – the "grand narratives" – of science are now in disarray ... The old guard resort to ridicule in order to shore up their fractured support. Even language itself is said to be devoid of meaning. All texts, this included, can be continuously deconstructed, reinterpreted, an infinite regression to the meaning … When there are no absolutes, we become confused …

> Third, this is no longer a period of consensus. The voices of those who cannot count themselves as able bodied, white, middle class, male, liberal and heterosexual now cease to remain silent … It is the discourse of consumption, not of production, which now holds sway. The media's message is to urge us to consume in order to be, not to produce in order to live … (Hartley, 1997: 51-52).

I have argued so far that two dialectic influences have intensified the national and individual "crisis of identity": globalisation, which makes the world both more homogenised and more diverse; and postmodernity, which is associated with fragmentation and disintegration (see also Welch, 2001). Hall (1992) maintains that identities in the wake of changing conditions could end up in three places: one, they could return to their roots and to their traditions (old or newly invented, see also Giddens, 1999); two, they can disappear through assimilation and homogenisation; and three, they can be translated and can create what Hall describes as a "culture of hybridity" (1992:310) – a dialogue and fusion between different cultural traditions.

It is argued that because religion plays an important role in the formation of identity, it emerged as a global force towards the end of the 20th century (Sacks, 2003). The refusal of dialogue has been perceived to have given rise to fundamentalism, defined as an *'embattled tradition locked into the new communication systems, the new cosmopolitanism produced by the globalisation of modernity'* (Giddens, 1999: lecture 3). I will return to the topic of identity, religion and fundamentalism in Chapter 3.

Most religious leaders would undoubtedly view the resurgence of religious communities positively; however, it poses a moral challenge to religious institutions. Sacks (2003), writing from a Jewish Orthodox viewpoint, warns of the dangers caused by politicising religion, by the mixture of religion and power and by the rise of tribalism, separatism and intolerance. To counteract the possible negative impact of the resurgence of new communities and identities, scholars from different contexts advocate the "politics of difference". This politics acknowledges the differences and the diversity of cultural, national and ethnic communities, and rejects the totalising meta-narrative of cultural identity and its tight relation to national identity (Fitzsimons, 2000). Significantly, Sacks (2003) acknowledges the politics of difference as the difference between various religions, but does not refer to the diversity within a religion. Religion is thus represented as monolithic – as an "imagined community" (Anderson, 1983) – a concept that will be further explored in this dissertation. Given the politics of difference, schools play a key role in identity formation and in the management of diversity, which explains the growing demand by different social groups to establish their own educational systems (Marginson, 1999).

It therefore seems that the intended and unintended effects of cultural globalisation and the paradoxical formation of both homogeneity and diversity, could be viewed as either negative or positive. Much depends on one's conception of identity, how it has been interpreted and adopted in the local contexts and, most importantly, *'whose interests are served'* by the cultural transformation (Ball, 1998:128).

The narrative so far describes the global economic and cultural transformation that provides the broader context within which the restructuring of the Jewish community schools could be explored and theorised. I argue that there is no essential determinacy to the ways in which globalisation processes work, mainly because the various globalisation processes contain inherent complexities and tensions, such as those between the local and the global, between fragmentation and control and between homogeneity and diversity. Marginson stresses this point with his observation that *'the more intensive the forces of globalisation, the more intense are the surges of dialectic and difference'* (2000a). These tensions within the process of globalisation create their own sites of resistance whose trajectories and consequences cannot be predicted.

The inherent complexity of globalisation affects the educational arena by promoting parallel conflictual and contested processes. Subsequently, two main discourses have permeated the education context: neoliberalism, with the attendant concepts of marketisation, restructuring and new managerialism; and communities and identities. These discourses and how they have affected educational institutions will be explored in the following sections.

Market fundamentalism and education

I argued earlier that the need to provide a work force for the nation state economy to compete successfully in the global market has exerted pressure on educational systems to become more efficient, economic and effective. This has subsequently brought about the market-led restructuring of educational systems around the globe, as well as the adoption of new managerialism as both a delivery system and as a vehicle for educational change. The aim of this section is to explore these processes and to assess their impact on educational systems. I will begin by unpacking the notions of restructuring and marketisation of education. I will continue by analysing the concept of new managerialism, its claims of efficiency and effectiveness and the main mechanism by which it pursues these goals, that is, decentralisation, accountability, the setting of clear goals and the adoption of a corporate culture. In this context the impact of new managerialism on the selected stakeholders in education – namely parents, teachers and principals – will be discussed.

School restructuring

Over the past two decades, there has been a widespread movement targeting the restructuring of schools. The Thatcher and Major governments in the United Kingdom during the 1980s and 1990s, undertook the fundamental restructuring of schools and attempted to establish education markets (Whitty, 1997; Ball, 1997a; Deem & Brehony, 1992). Chubb and Moe (1990, 1991) recommended that the United States should follow that example. Market-led restructuring of educational systems and institutions were also widespread in Australia (Kenway et al, 1993), New Zealand and other educational centres (Vandenberghe, 1999; Whitty, 1997) as well as in South Africa (Chisholm, 1999). The extent to which restructuring reforms have been implemented and the result of their implementation vary considerably due to local conditions (Daun 2002; Whitty, 1997).

Restructuring became a popular name to any reform or change in education (Lawton, 1992). The logic of restructuring is that problems in education could be ascribed to the basic structure of schooling. Market-led restructuring emphasises choice, privatisation and decentralisation (Daun, 2002; Boyd & Lugg, 1998). It is claimed that it would save costs, improve students' achievements and increase accountability (Daun, 2002). Hargreaves (1994) maintains that in some instances restructuring can be reduced to top-down reform or ruthless retrenchment. This argument is plausible especially because most school restructuring occurs in times of economic crisis (Barton, 1998; Deem, 1996).

Why has market-led restructuring of educational institutions become so prevalent? Globalisation has been suggested as one explanation (see also Carnoy, 2002; Hargreaves, 1994). The research literature offers other explanations, some of which are loosely connected to globalisation. It is suggested that this popularity relates to changes that have occurred in the way people think about education (Boyd, 1992) and that "market fundamentalism" (Soros, 2002) has become the "new orthodoxy" (Ball, 1998). Some researchers view the development of market ideology in education as a natural evolution in school governance taking over from the professionals and the bureaucrats (Reed, 2001; Murphy, 1999; Boyd, & Lugg, 1998), referred to elsewhere as "bureau-professionalism" (Clarke & Newman, 1997) or "welfarism" (Gewirtz. & Ball, 2000). Levin (1998) compares the spreading of market-led restructuring to an epidemic. He argues that under certain conditions, any organisation would be susceptible to the same type of reform. The popularity of market-led restructuring has been attributed to a number of other factors, namely to: the perception of certainty that the marketisation discourse provides in the postmodern world (Welch, 1998a); the internationalisation of knowledge (Deem, 2001); policy borrowing (Halpin & Tronya, 1995); and policy entrepreneurs such as academics, politicians, consultants and sponsors – for example, the World Bank – which transport ideas from one context to another (Deem, 2001; Ball, 1998a; Currie, 1998; Whitty et al, 1998).

The problem with new ideas is that they are spread and repeated uncritically even if those who repeat them can only comprehend them in terms of clichés (Rees, 1995). The next section will therefore explore what market-led restructuring has meant in the educational context and how it has impacted on schools.

The school as a business

Market-led restructuring is premised on the belief that schools should be run like a business; that is, that "business knows best" (Jamieson, 1996). At the head is the chief executive officer (CEO), or a CEO-like manager, and students are the clients/customers. The market and not the state is responsible for allocating resources, and it demands that educational institutions – whether these are schools, colleges or universities – would become accountable and cost effective. Putting education in the market place means shifting education from being a "provider capture" to a "consumer capture", whereby education appears as a commodity, allowing parents to choose between a range of products that suit their needs. It is expected that schools would become more effective because of competition. Customers can exercise their choice, which is believed to be morally good (Menter et al, 1997).

Those who advocate market ideology, such as Chubb and Moe (1990; 1991), criticise the politics and bureaucracy of the bureau-professional regime in education. It is argued that under that regime schools are ineffective, mainly because decision makers are too distant from the education users; they are not responsive to local demands and are not accountable. It is implied that politicians, bureaucrats and professionals – under the façade of democratic governance and professional expertise – have furthered their own goals. Moreover, it is claimed that the bureaucracy has been instituted in order to stop other stakeholders with different interests from gaining power or authority, and that bureaucracy therefore impacts negatively on the functioning of schools and of pupils' achievements (ibid).

The market discourse produces political capital gains due to its rhetoric of high efficiency and cost reduction, the demise of central control and professionals' control, and its support of libertarian ideology in terms of choice, individualism, diversity and ownership (Foskett, 1998; Hartley, 1998).

The notion that schools should be run like a business is, however, open to a range of interpretations. It could mean that education could provide a profitable business for entrepreneurs or it could mean that education be managed like an enterprise or a corporation. The literature has debated the appropriate relationship between business and education. Fullan (2001) argues that schools and businesses are on the same evolutionary path and that they have much to learn from each other. Bottery (1994) also recommends a dialogue between schools and business. He maintains that education cannot ignore the lessons of commercial organisations, but it

has to be selective and adopt only those techniques and strategies that are compatible with educational philosophies and values. On the other hand, Hargreaves[2] argues that business and schools are incompatible. The main agenda motivating business is to generate profit while the nature of education is a social good. It is therefore unrealistic to demand that business act against its own survival by developing a moral agenda. Hargreaves qualifies (2003) that business can behave morally, but only when morality serves, or at least does not threaten, its interests. Soros – an entrepreneur who acknowledges the economic benefits of the global market – expresses a similar sentiment: *'The amorality of financial markets is one of the factors that contribute to their efficiency: It allows participants to be single-minded about maximising their returns without regard to the social consequences'* (Soros, 2002:4).

Other educational researchers have also reasoned against equating schools with markets. There are three main lines of argument here. The first argument deals with the obvious differences between market ideology and schools on both the demand and supply sides (Woods et al, 1995; Tooley, 1995). On the demand side, management (supply) and customers[3] (demand) have the potential to exert some control over the product (the education of pupils) (Vandenberghe, 1999; Whitty, 1997). The educational benefits to society cannot be quantified and consumers cannot monitor the quality of schooling because their knowledge of the "product" is limited. On the other hand, professionals are the experts and the monitors of quality; they decide what should be provided for the customers (Foskett, 1998; Hawley, 1999). Parents choose a school because "it feels good" (Adnett & Davies, 1999; Ball & Vincent, 1998; Deem, 1994), because of its role as a producer of social capital (Ball, 1997c) or because of its proximity to their home (Menter & Muschamp, 1999; Hatcher, 1994) and not because of the effectiveness of the provisions. Furthermore, parents or pupils as customers are reluctant to exercise their "exit" threat, even when schools do not respond to their demands (House, 1998; Woods et al, 1995).

On the supply side, there are numerous barriers to consumer responsiveness, such as national curriculum, reputation, locality and financial constraints (Bagley & Woods, 1996; Hatcher, 1994; Woods et al, 1995).

These differences have encouraged some analysts to describe the education context as *quasi-market* or *imperfect market* (Whitty & Power, 1997; Jamieson,

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[2] Hargreaves, 25 February 2002 – Public lecture GICD, Johannesburg.
[3] Note that the notion of the customer in education is not clear (Woods et al, 1995; Hartley, 1994).

1996), which combines both bureaucratic and market controls (Vandenberghe, 1999). In this *quasi-market*, for example, per capita formula funding and parents' choice substitute the notion of profit that underpins real markets (Hatcher, 1994).

The second argument relates to the tendency to idealise the market and its rewards (Adnett & Davies, 1999; Woods et al, 1995). First, not all businesses are profitable or efficient (Boyd & Lugg, 1998). Second, the market is only able to expand at the expense of another, thereby producing winners and losers (Morley & Rassool, 2000). Winners in the education market are the "able", "middle class" students (referred to as "cream skimming"), while the losers are the children from working class backgrounds, those with special education needs, and other "expensive" clientele (Welch, 1998; Whitty & Power, 1997; Woods et al, 1995). Third, the human costs of the market are high, including employee redundancy, low morale among those who stay, bullying and greed (Rees & Rodley, 1995). Fourth, it is argued that market forces could only motivate a change that is not enduring, and that schools and teachers change just enough to compete and to win in the market place (Sergiovanni, 1998). Fifth, market rewards shrewdness and institutional survival rather than community principles, such as care and concern for social justice. It encourages commercial rather than educational decision-making, individualism rather than collectivism, suspicion rather than cooperation and expediency rather than need (Hargreaves, 1993). Deem and Brehony (1994) suggest, for example, that the marketisation of schools has negative effects on the governing body as it exacerbates the value divisions between governors in the same schools. They claim that, contrary to its rhetoric, marketisation does not encourage greater efficiency, but rather the investing of resources in market appeal and image. They further claim that:

- because of their need for new recruits schools are more concerned with future pupils than with the needs of present pupils;
- schools have a false sense of autonomy as each school solves its own problems, even though these are general and not specific;
- schools move towards uniformity rather than diversity because they try to attract the same type of student;
- each school turns inwardly, examining its image and market appeal; and
- there is not much concern with educational issues.

The third argument focuses on the overall mistrust in the market ideology and its negative impact on individuals and communities. As been mentioned before, both Soros (2002) and Hargreaves (2003) imply that market forces serve self-interest rather than public interest. It has been maintained that market forces are socially constructed, never neutral and that the state is always implicated in their framing and regulation (Barton, 1998). Moreover, the market tends to trade on the insecurities of clients, making it advantageous for business to promote uncertainties and crises. The political economy of uncertainties is good for businesses – it disciplines customers by fear and elicits passive submission to the rules of business (Bauman, 2001). It is further argued that market ideology is a disguised modernist bureaucratic approach infused by postmodernist rhetoric. It is therefore used as a deceiving strategy by the state (in public organisations) or by employers (in private organisations), in order to offer a modern world's certainty of meaning and truth, while appealing to the postmodernist consumer culture (Hartley, 1998; 1994; Morley, 1997; Hatcher, 1994).

Linked to that is Apple's (2001) assertion that the neo-liberal notion of the market transforms our idea of democracy, turning it into a "thinner" economic concept based on "possessive individualism", instead of a "thick" political one. This is assumed to have a negative impact on the notion of community, and its net result is an atomised society of disengaged individuals who feel demoralised and socially powerless (McChesney, 1999 quoted in Apple, 2001).

Based on the above criticism, it is evident that the introduction of market-led restructuring of educational institutions would bring with it various conflictual issues. It has therefore been suggested that the marketisation process would not solve the problems of education but would merely exchange one set of problems for another (Murphy, 1999).

Market ideology demands strong management that can control the labour force and deliver what has been described as the three Es: economy, efficiency and effectiveness (Morley, 1997; Randall, & Brady, 1997). Those who advocate market-led restructuring usually endorse managerialism as a transformative device. The next section will elaborate on the concept of managerialism and new managerialism and will explore their impact on the educational systems and stakeholders.

Managerialism and new managerialism

Managerialism is a rational, technicist approach to educational management based on *'the belief that all aspects of organisational life can and should be managed according to rational structures, procedures, and modes of accountability in the pursuit of goals defined by policymakers and senior managers'* (Wallace & Pocklington, 2002:68). In this logic, educational institutions, among other public services, should follow models of restructuring in the private sector, in businesses and in industrial types of organisations (Clarke et al, 2000; Deem, 1998; 2001; Avis, 1996; Deem & Brehony, 1994).

The main claim of new managerialism is that it would rescue public services, such as education, from the "bureau-professionals" or "welfarism" whose "aged" and "worn out" type of governance failed to manage efficient and effective schools (Simkin, 2000; Murphy,1999; Vandenberghe, 1999; Troman, 1996; Tyack, 1993). As mentioned earlier, those who advocate the managerialist discourse suggest that bureau-professionalism has as much to do with the *'consolidation of power and protection of privilege as with altruism'* (Whitty et al, 1998:54) and that the bureau-professional regime has been based on *'hierarchy, secrecy and paternalism'* (ibid) and is not necessarily democratic (Deem, 1996; Thody, 1994; Brehony, 1992). By contrast, managerialism claims to offer a progressive and liberating potential, especially as it responds to stakeholders' needs and empowers managers and others within the schools (Whitty et al, 1998).

Managerialism is based on early Taylorist claims that management is a rational, scientific discipline (Morley & Rassool, 2000; Morely, 1997, Bottery, 1992). Some of the key values and techniques highlighted by managerialism include:

- the promotion of a corporate mission with goals, targets, monitoring procedures and performance procedures;
- strict financial management and devolved budgetary controls;
- the monitoring of efficiency and effectiveness through the measurement of outcomes and individual staff performances;
- the use of internal cost centres;
- the fostering of competition between employees;
- the marketisation of services;

- management of change which is a primarily top-down activity, with staff adopting a passive role; and

- increased responsiveness to clients/customers and the creation of a disciplined, flexible workforce, using flexible/individualised contracts, outsourcing, appraisal systems and performance-related remuneration (Trowler, 2001; Morley and Rassool, 2000; Deem, 1998; Morley, 1997; Randle, & Brady, 1997).

Pollitt (1993) proposes that managerialism is more than a set of practices. He presents it as an ideology since it manifests five attributes of ideology: first, it involves a framework of values and beliefs indicating how the world should work, that is, by adopting good management practices from the private sector. This framework perceives management to be crucial for organisational and social amelioration and endorses managers' rights to manage. Second, it concerns social groups and social arrangements. It represents a shift in the relations of power between professionals and managers, with the latter being placed in a dominant position; it is orientated towards the customer and the "market" rather than the producer; it emphasises individualist rather than collectivist conceptions of employment relations; and it assumes that staff in an organisation can be relatively easily managed through clear procedures. Third, it is systematically structured. The belief in the potential of better management is connected to the favourable analysis of corporate sector achievements and the lack of confidence in the state and its inefficient structures; the general tendency towards privatisation; the popularity of management solutions to what was previously considered as political problems; and the increased concern with "results", "performance" and "outcomes". Fourth, managerialism is developed and maintained by social groups such as managers, owners, governments, etc. Those groups may find it convenient to adopt, at least rhetorically, certain elements of managerialism, even if they do not subscribe to the whole package. And fifth, managerialism as an ideology provides a justification and a guide for action.

So far I have used the terms managerialism and new managerialism interchangeably. This is not a case of overlooking the differences, but rather indicates the incoherence in the research literature with regard to these differences and the lack of a working definition. Discussions by Fitzsimons (1999), Wallace and Pocklington (2002) and others have broadened my understanding of these concepts and provided

me with satisfactory answers to questions that have intrigued me since the onset of this research, namely: What is new about "new managerialism" and how does it differ from "old managerialism" (assuming that if there is new managerialism, there must be an old one)?

Wallace and Pocklington (2002) use the discourse of power to explain the differences. They differentiate between three variants of managerialism according to the mechanism each variant uses to increase managerial control over others' agency: namely *neo-Taylorism*, *entrepreneurship* and *cultural management.* These three ideal types of managerialism complement each other by providing a comprehensive set of control mechanisms and may be operated together when policy makers seek to maximise their degree of control.

Neo-Taylorism controls through overt means and is contingent on compliance. Power is concentrated in the hands of policy makers and managers acting on their behalf. It operates through detailed specification of who is to do what to achieve identified targets. It introduces narrowly focused training and strict forms of measurement in order to assess and enhance performance as well as to impose accountability. It is a centralised system, and school staff and managers must comply regardless of their own values and practices, or face disciplinary measures (Wallace & Pocklington, 2002; Pollitt, 1993). This set of practices is loosely termed "old managerialism" (Hartley, 1997; Ball, 1997a).

Entrepreneurship uses covert indirect control offered by the market. It emphasises decentralisation, choice and competition. The operation of the "hidden hand" of the market ensures competition for institutional or individual survival. Efficiency is maximised through the consumers' self-interest to receive value for money. Compliance is achieved through consumer demand, which disciplines the producers and shapes the product (Wallace & Pocklington, 2002).

Cultural management is contingent on indirect control based on overt and covert mechanisms designed to align the beliefs and values of managers and those they manage with the beliefs and values of policy makers (ibid:69). Compliance is achieved through commitment to the creation of a shared vision, and the means (techniques) to realise it. For example, capacity building may be employed to encourage the achievement of official goals. The long-term aim is to transform compliance into commitment, thereby wining the "hearts and minds" of those who are managed (Fullan, 2001a). In other words, stakeholders have to be *'captured by the*

discourse'[4] (Trowler, 2001). This is known as *new managerialism.* Whereas neo-Taylorism focuses on intensifying systems of direct control, new managerialism offers a "people-centred" model of the organisation where competitive success will be achieved by loosening formal systems of control and by motivating people to produce "quality" and to strive for "excellence" themselves (Ball, 1997a).

Fitzsimons (1999) employs the Foucauldian's concept of *governmentality* (the "art of government") to explain new managerialism. Governmentality is defined by Foucault as *'the ensemble formed by the institutions, procedures, analysis and reflections, the calculations and tactics, that allow the exercise of this very specific albeit complex form of power'* (Foucault, 1991:102). In this analysis new managerialism is a form of power that "regulates" rather than "controls". Regulation relies on self-monitoring, whereas control is more direct and explicit. New managerialism therefore attempts to achieve cultural hegemony not by domination alone but also by the ways in which individuals implicate themselves in their own governance, that is, self-governance. Foucault forwards the notion that human beings are constructed to think that they can tell the truth about themselves, referred to as "technologies of self", and thus they become subjugated as subjects to lead useful, docile and practical lives (Marshall, 1995). "Technologies of domination" is another Foucauldian concept which refers to those acts that classify and objectify individuals, for example, established norms, examinations, promotions, remedial treatments and, when necessary, disciplinary punishments. Individuals tend to accept these objective classifications and thus construct their own identities accordingly (ibid). Self-governance as a form of governmentality occurs at the intersection of technologies of domination and technologies of self. This explanation sees new managerialism as a governance structure, which accounts for both agency and domination.

While there is a danger that new managerialism would be conceptualised as a totalising and deterministic framework, using the concept of governmentality links power with resistance. According to Foucault, power is not omnipotent – on the contrary: *'Power can only exist where there is a possibility of resistance and, thereby, the attainment of freedom'* (quoted in Marshall, 1995:30). In support of this concept

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[4] The word *discourse* can be related in a limited way to the language that is used. In its most extended form, discourse can mean ideology or even culture. Trowler (2001) defines it as more than a text and less than a culture – as social practice conditioned by social structures. In this interpretation, discourses are intimately situated in social contexts; they both reflect context and constitute them.

Trowler (2001) argues that not all academics are "captured" by the managerialist discourse and that some of its practices are mitigated. Similarly, Wallace and Pocklington (2002) advance the idea of "counter-policy" to capture how stakeholders react against a policy initiated in the managerialist central government, which does not align with their beliefs and values.

Even though any exercise of power may bring about resistance, new managerialism is difficult to resist, either because of its invisibility or because if its seemingly rational claims. For example, Currie (1998) claims that new managerialism and its attendant notions of governmentality and performativity have negatively affected universities in Australia, the United States, Canada and New Zealand by shifting the emphasis from "what is true" to "what is efficient" and "saleable". In the conclusion to her study, Currie proposes that the subtle way in which these practices have infiltrated universities weakens resistance. "Herculaneum efforts" are therefore required in order to counteract these changes. A similar argument is highlighted by Fitzsimons (1999):

> Because managerialism sees itself as the antidote to chaos, irrationality, disorder, and incompleteness, there are no spaces within such a social order in which autonomy can be contested legitimately. Managerial definitions of quality, efficiency, improved productivity or self-management, construct a particular version of autonomy. Those who do not desire these managerial constructs of autonomy are simply defined as absurd, as under managerialism, these notions appear as self-evidently 'good'. Even the presentation of resistance itself indicates an engagement already within the definitions provided by managerialism.

To sum up, while new managerialism can be perceived as a totalising technology that subsumes education in its discourse – mostly by advancing the language of efficiency, quality and self-management – its power is not unlimited and it creates its own sites of resistance. This resistance is, however, limited because of the pervasive power of the discourse and its invisibility. It is for this reason that Fitzsimons (1999) and Trowler (2001) call on academics to adopt critical theoretical positions that locate the managerialist discourse in relation to power, and thus challenge this increasingly hegemonic way of seeing the world; a challenge that I attempt to pursue in this case study.

New managerialism

The aim of this section is to unpack the conflictual nature of new managerialism by analysing some of its claims and practices. I will begin by exploring the main tenets

of new managerialism, that is, the notions of efficiency and decentralisation, and the corporate notion of shared goals and accountability. I will end this section by exploring the changing roles of managers, teachers and parents within the managerialist structure.

Efficiency

New managerialism and the market ideology introduce the concepts of efficiency and effectiveness into education, based on the notion that more efficient management will create better schools by freeing up resources and using them in a more effective manner. Efficiency may be translated into cost effectiveness, value for money, responsiveness to market forces, controls on spending, outsourcing of services, performance indicators, quality assurance, accountability, output measures and income generation (Lawton, 1992).

At face value, no one would object to the idea that educational institutions should run efficiently and effectively. However, there are paramount problems with this approach.

First, there is the danger that efficiency would become synonymous with pure "economism", that is, the attempt to cut spending and increase the quantity of teaching regardless of the quality of education that is provided (Vandenberghe, 1999; Barton, 1998; Welch, 1998; Whitty et al, 1998; Randle & Brady, 1997).

Second, it is not even clear whether efficiency in education could be measured at all. It is based on the assumptions that a direct link between input and output can be established and that input costs and output benefits can be measured accurately. Both these assumptions are questionable. Furthermore, emphasis on efficiency provides opportunities for concealment and displacement of costs to parents, to the community or to other cost centres (off-budget costs) (Muetzelfeldt, 1995).

Third, it is argued that the corporate drive for efficiency is counterproductive as it lowers workforce morale and ultimately reduces output and profits (Troman, 2000). Similarly, Bottery (2000) maintains that management often uses job redundancy as a pretext to offload burnt-out workers and takes in fresher, cheaper workers in order to achieve greater efficiency. He argues that these are immoral practices that may increase employee insecurity, promote distrust in management and loss of commitment and loyalty to the organisation, which will eventually affect the organisation's productivity.

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Fourth, the notion of efficiency subjects schools and teachers to "human accounting", that is, the grading of the effectiveness of individuals and organisations according to performance indicators; this reduces the idea of a good school to measurable criteria of performance whilst ignoring important aims and goals of education that extend beyond the measurable, such as social values (Morley & Rassool, 2000; Welch, 1998; Rees, 1995). This human accounting brings some critics to suggest that the drive for performance would create a "McDonald's society", (Ritzer, 1993) advancing distinctive notions of efficiency, quantification and calculability, predictability, control and profit (the bottom line). In education, efficiency means that time, space and people are all optimally managed. Quantification and calculability mean that everything is measured and costed. It therefore allows for competition, which rewards the winners and exposes the losers, as well as setting yardsticks by which teachers' performance can be rated by their learners or peers. Predictability is achieved by emphasising systems and standardisation of educational outcomes. Control is attained by introducing non-human instead of human technology – a process which is referred to as the "dehumanisation" of education (Welch, 1998; Mok, 1997; Hartley, 1995).

Fifth, a major concern around the efficient management of schools is who benefits from the cost saving and, more importantly, who decides on the criteria that define what counts as costs and benefits (Fitzsimons, 1999). It has been argued that the money saved by efficient management is not used to promote educational needs, but is instead used for the "glossification" of the schools (Whitty & Power, 1997). This glossification seems to be focused on a number of core activities, such as the refurbishing and decoration of buildings, the production of publicity materials, communication with the press, prospectuses and a variety of public events (Gewirtz et al, 1995). It is also suggested that the efficient use of resources requires schools to make strategic marketing choices and to favour those clients who will bring the greatest return for the least investment; less attention is given to marginal and disadvantaged groups and there is increased segregation along the "ability" line (Vandenberghe, 1999; Welch, 1998; Randle & Brady, 1997). Good schools with more resources therefore attract the "good" pupils, while weak pupils occupy failing, weak schools, or schools that are facing economic crisis (Whitty et al, 1998).

Sixth, in order to control the extent to which schools are run efficiently, new levels and forms of bureaucracy are created which could offset the efficiency gains

and paradoxically bring back the same mechanism that managerialism tries to dispel (Morley & Rassool, 2000; Webster & Mosoetsa, 2001).

Lastly, adopting the corporate model of efficient management sends an incorrect message to the new generation about ethics and care. This argument has been taken up by Apple (2001) who maintains that most corporations are totalitarian institutions, where jobs are cut ruthlessly and profits are much more important than the lives, hopes and well being of long-standing employees. He questions whether this is the model that education should borrow. It therefore seems that the dilemma facing educational institutions is how to be both efficient and caring. The question is – can schools afford to care?

Gumport (2000) emphasises this point when she argues that when applying the logic of efficiency to higher education, the notions of creativity, caring, relationships, etc., are devalued and considered to be irrelevant. While she concurs that no one would deny that educational institutions have to survive financially, gains in one dimension mean losses in another. For example, a campus can generate resources while compromising its moral and social values:

> The danger is that an attempt to gain legitimacy through the use of market discourse and managerial approaches may end up losing legitimacy by changing their business practice to such a degree that they move away from their historical character, functions and accumulated heritage as educational institutions (Gumport, 2000:87).

It therefore appears that under new managerialism, values such as care tend to be sidelined in the pursuit of monetary considerations. In the corporate context there is talk of respect, but not of care – neither for other persons nor for the environment (Hargreaves, 1994). When care is promoted, it is assigned a second-order status and it is conditioned upon managerial calculation rather than being given an unconditional ethical value (Bottery, 2000). The same applies to trust (Bottery, 2003), where trust in people has been shifted to trust in expertise and processes (Hargreaves, 1994). Moreover, Hargreaves emphasises that in the "knowledge society", traditional types of paternalistic care, such as giving charity, are no longer enough. What is required is responsiveness to pupils' diverse needs, ideas and feelings; care *'must become a relationship in which those who are cared for (pupils or parents) have agency, dignity and a voice'* (2003:47). Moreover, care must not be restricted to one's immediate community; care must be extended to those who cannot benefit from the global world.

To sum up, there is little evidence to suggest that education is benefiting from the new managerialist demand for efficiency. Quite the opposite is more likely. The literature review has demonstrated that the call for efficiency and financial gains creates social, cultural and personal losses, and that they tend to undermine values that educational systems should be fighting for, such as care and trust. Efficiency and financial benefits need to be carefully balanced against these social costs. This calls for leaders with a strong "moral purpose" (Fullan, 2001) who can ensure that the quest for efficiency will not compromise the social and moral agenda of education.

It has been assumed, yet not proven (Daun, 2002), that greater efficiency could be achieved by decentralising the decision-making process, bringing it closer to where the money is spent and thereby reducing the overhead costs associated with centralised administration. These claims will be investigated in the next section, where the notion of decentralisation, its conflictual character and its impact on education are examined.

Decentralisation

Decentralisation has been a global trend in education systems since the late 1980s. Examples of this are School Based Management (SBM) in the United States and Canada, and Local Management of Schools (LMS) in England and Wales. Approaches to educational reform in the South African context after 1994 have also been constructed within the discourse of decentralisation, and this is provided for in the South Africa Schools Act 84 of 1996 (Fleisch, 2002, Sayed, 2002; 1999; Rossouw, 2001; Carrim, 2001).

The history of educational reform shows how educational governance shifted from decentralisation to centralisation and back to decentralisation, without having a significant impact on the problems they were intended to solve (Elmore, 1993; Tyack, 1993; Cuban, 1990). It seems that both processes are offered in order to solve the same problems, such as efficiency and cultural diversity (Bray, 1999). Moreover, Tyack (1993) argues that schools typically respond to demands for change by adding a new mechanism or agency, and those rarely disappear. Most changes in governance, whether centralisation or decentralisation, have therefore generally left institutional deposits and have resulted in school structures being more complicated than before.

Centralisation has been linked to the Fordist/Weberian/modernist ideal form of bureaucratic organisation, which is characterised by a set of rules and procedures with

strict lines of control and authority extending upwards through a pyramid hierarchy. The decision-making process is concentrated at a central or top authority, leaving tightly programmed routine implementation to lower levels in the organisation (Lauglo, 1995). It promotes coordination and integration, uniformity and standardisation as well as economies of scale. Centralisation is associated with strong nation states and has been extended to civilian public services and organisations operating in a modern society.

Decentralisation marks a shift away from this model towards a post-bureaucratic, post-Fordist regime, which emphasises outcomes rather than rules, and results rather than methods (Exworthy & Halford, 1999; Hatcher 1994). Decentralisation is seen as being more suitable for organisations that operate under conditions of instability in the postmodern society and need to become more flexible, responsive, dynamic and innovative so that they can respond quickly to opportunities or unanticipated problems. It is claimed that decentralised systems are democratic and can empower teachers and parents. Decentralised systems are perceived to be efficient, accountable and responsive to local needs. They seem to provide more flexibility and choice to individual schools, improve their effectiveness and quality and increase funds available to deserving teachers through performance-based payment (Astiz et al, 2002; Schlechty, 1991).

Decentralisation may be seen as a prerequisite for the introduction of market relations. Once discrete, semi-autonomous units are established, specific budgets can be attached and units can be instructed to carry out their own buying and selling of goods and services. Schools have more control over their budgets and day-to-day management, receiving funds according to a formula determined by the number of pupils (Exworthy & Halford, 1999). It is assumed that decentralised, semi-autonomous institutions would improve their performance in order to compete for clients and thereby access more funds. At the same time, clients (parents) would monitor the quality of education they obtain for their children.[5]

Interestingly, both governments and marginal groups favour decentralisation. For governments it means curbing expenditure and for oppositional or marginalised groups it means furthering their own interests. Lauglo (1995) explains that there are various rationales for decentralisation. There are those rationales that are concerned

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[5] The limitations of these assumptions were discussed earlier in this chapter, in the section on the difference between markets and schools.

with quality and efficiency, such as professionalism, management by outcomes and market mechanisms, and there are political rationales for decentralisation, such as liberalism, participatory democracy, populist localism, etc. Lauglo argues further that in addition to the publicly manifested justifications for decentralisation, there are practical circumstances relating to the scale and complexity of the education system one wishes to reform. These practical considerations include the magnitude of the educational enterprise, the heterogeneity of the clientele, the financial burden of the central authorities, the problems with communication, the vested interests of those in authority in augmenting or defending their power and legitimacy and the political expediency for both concentrating and distributing authority. Weiler (1993) likewise maintains that decentralisation may be seen as an attempt by states to increase their legitimacy, to neutralise conflicts in society and to mobilise more resources from civil society. Elmore (1993) exemplifies this argument by maintaining that the move for either centralisation or decentralisation in the American education system was less about efficiency and more about politics. More specifically he sees it as a debate around the issue of *'how to construct a public for public education'* (38); in other words, what constitutes "the people" – is it the parents, the community or the broader society? And whose interests does decentralisation or centralisation serve?

Decentralisation is the main mechanism by which new managerialism shifts the power relations within a school. Decentralised systems increase the power of managers and lead to a stronger, hierarchical top-down–type management in schools, as well as to a wider gap between teachers and managers (Whitty et al, 1998). It appears that in decentralised systems, opportunities for the professional development of teachers are threatened rather than enhanced. Decentralisation therefore marginalises, de-professionalises and disempowers teachers, despite its democratising rhetoric (ibid). This de-professionalism of teachers is linked to the introduction of a new form of regulation over the profession. Traditionally to be professional meant to own both the ends and the means of education. As Hartley (1997) points out, however, under new managerialism, decentralisation separates the "ends" and the "means" of education. The control and regulation of teachers' labour is achieved through mechanisms such as accountability and performance-based payment (Lugalo, 1995).

From a critical point of view decentralisation could be seen as a purely budget cutting exercise (Bray, 1999; Whitty et al, 1998*), and there is no clear indication that

it enhances pupils' achievements (Whitty et al, 1998) or efficiency (Elmore, 1993). It is argued that the rhetoric of devolution and decentralisation has made no real impact in practice; first, because most key decisions are not devolved (Bates, 1996), and second, because even when structures are decentralised, this does not mean that stakeholders at school level would know what to do with them (House, 1998). Braslavsky (2001) refers to the latter phenomenon as one of the paradoxes of decentralisation. She maintains that stakeholders are often disconcerted when the central authority withdraws, and are unable to maintain the old order or to set up a different one. Consequently, they demand the return of central authority to bring back the "good old times". Another paradox of educational decentralisation is the continuation of mediocrity or the maintenance of poor institutional and pedagogical practices learned under the previous regime. This happens when stakeholders do not wish the return of the old order, but at the same time they do not feel the need to create another order or to invent alternative forms of regulation or practices. Consequently, those stakeholders would mostly follow routine practices are no longer required (ibid) or would attempt to conserve or reinvent the past (Whitty et al, 1998).

In some instances decentralisation may be seen as a mechanism to shift to schools or teachers the responsibility to solve problems that the central agency could not solve before. In this way the legitimacy of the central agency is not threatened (Ball, 1998a; Whitty et al, 1998; Troman, 1996a; Lawton, 1992). In this view, decentralisation is seen as a manipulative system, which aims to absolve the central authority of much of its responsibility and allows the centre to distance itself from unpopular decisions while leaving the schools to deal with them (Morley, 1997).

Linked to this is the argument that new managerialism provides strong centralised control while giving the appearance that power has been devolved to individuals and autonomous institutions (Whitty et al, 1998). More bluntly, decentralisation has been perceived as mere window-dressing (de Clercq, 2002). Astiz et al (2002) attributed these contradictions to the conflictual process of globalisation, which has pushed nations and organisations into various mixes of decentralised and centralised educational systems. This has resulted in all kinds of paradoxes, such as in the case where authority is centralised and implementation is decentralised. Other instances include schools that manage themselves financially while the outcomes are centrally controlled (Vandenberghe, 1999; Elliot & Crossley, 1997; Whitty & Power,

1997; Boyd, 1992), or schools that self manage their budgets, while the conditions of funding are decided by a central agency (Hartly, 1994).

While decentralisation has been considered as a pre-condition for the establishment of market relations, there is an inherent contradiction between the concept of decentralisation and the essence of market ideology. As mentioned before, decentralisation claims to be a democratic move as it undertakes to place power in the hands of the stakeholders – principals, teachers, local communities and parents – so that they can develop the kind of education that reflects their preferences and interests. Decentralisation therefore relates to what has been described as a "stakeholder society" (Whitty et al, 1998). Market principles tend to foster a form of "possessive individualism", which focuses on the needs of individuals, and is in contrast to decentralisation's rhetoric of stakeholder society. It seems that the advocates of marketisation use the notion of community or stakeholders to evoke positive feelings towards the changes, especially since the rhetoric of "community" appeals to people from the "right" and also from the "left". However, according to research undertaken by Whitty et al (1998), in practice most governments are reluctant to encourage communities to build their own schools, and that most schools are centrally controlled.

In summary, the idea of decentralisation is seen to be paradoxical and precarious. It is driven by both political and economic imperatives. Politically, it claims to be a democratic process, which could increase the flexibility and responsiveness of schools to the diversified needs of local communities, and would give more power to stakeholders to develop the type of education that reflects their preferences. From an economic perspective, decentralisation claims to reduce the inefficiencies of bureau-professionalism, thereby decreasing the costs of education. However, research has hardly confirmed these assumptions, but rather claims that what decentralisation appears to be giving with one hand it takes away with the other. Devolution of power is therefore offset by control mechanisms, such as outcomes and goal setting. The rhetoric of empowerment and autonomy is counteracted with performativity and regulation devices, such as contracts and performance indicators. These control mechanisms, however, carry their own conflictual nature, as the following sections will demonstrate.

Goal setting

In the managerial way of thinking, an organisation needs to promote a corporate mission, with goals, targets, monitoring procedures and performance measurement (Morley & Rassool, 2000). For schools this means plans, mission statements, targets, strategies and the production of symbols that schools are expected to have. Those who advocate the market ideology, such as Chubb and Moe, argue that when schools define their core business (just as a firm like McDonald's does) and select students on that basis, they would run more efficiently.

The potential advantages of achieving consensus among school staff, management and other stakeholders about the goals of schools and the ways to achieve them, is not debatable. What is new in the new managerialist thinking is the idea that shared goals are now dictated by the harsh realities of the market, in which schools sink or swim (Hatcher, 1994). Meyer (2002) asserts that the notion of clear goals is especially attractive to those educational organisations that operate in volatile and turbulent contexts. By defining their goals and missions these institutions can decide which activities should be "inside" or "outside" their boundaries. In this way, institutions could respond to the demands of the changed environment and eliminate some of the uncertainties created by the market.

The notion of clear goal setting in education raises some important questions. The first pertinent question to ask is whether this corporate technique is compatible with the way schools function. Reimer and McGinn (1997) argue that schools are not rational organisations that work systematically towards clearly articulated goals, but are rather complex and irrational organisations with hazy and multiple goals. Moreover, in education it is not even obvious who the "customers" are, whose interests the system should serve and to whom it is accountable. This undoubtedly is what makes education a complex and difficult enterprise to manage.

Yet Reimer and McGinn acknowledge that schools fail because they do not have clear goals and visions and because they are trying to do too many things and to satisfy too many stakeholders. They also concede that in many cases the variety of goals and needs results in the creation of various functionary bodies within the organisation, which they describe as *'quilts to which patches have been added over the years'* (1997:47). The multiplicity of goals and agendas create duplication of and confusion about functions, as well as poor coordination and communication between different units within the organisation. Moreover, the unspoken targets and strategies

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of the staff who work in the organisation often influence goal setting and could prevail over declared goals and objectives.

In the new managerialist thinking less attention is given to the way in which schools function while there is an expectation that the establishment of clear goals would resolve inherent tensions. Educationalists disagree. Hargreaves (1995) rejects this corporate approach and suggests that schools should find a balance between bland and vacuous missions which appeal to many different interests and between mission statements which can become so fixed that they will not enable schools to respond to changing needs. He therefore advocates that schools have "moving missions" which are temporary and approximate and do not require complete consensus.

The second question revolves around whose goals and missions are promoted. Hargreaves's (1994) distinction between vision and voice is a useful concept to debate this issue. Hargreaves maintains that in the postmodern context, the voice of teachers, which was previously marginalised, should be heard. However, the rise of dissident voices threatens traditional centres of power and control. Hargreaves therefore maintains that there is a strong sense that the vision that is articulated is the principal's vision, while teachers learn to suppress their own voices. Real collaboration means creating a vision together. By complying with the vision of management, ownership of the educational endeavour is individual rather than collective and hierarchical.

The third question is how consensus can be achieved. For Hatcher (1994) the notion of common consensus, or a shared vision within a school, is bound to fail. This failure derives from the conflicts present in working relations within both schools and wider society. He therefore proposes that a call for consensus is sometimes merely rhetorical. At the most it can create an enforced collaboration or "contrived collegiality" (Hargreaves, 1991) which meets the implementation needs of bureaucratic systems rather than the development needs of teachers and schools.

Consensus and shared goals have the propensity to be exclusive rather than inclusive. Bottery (2000) makes this point by arguing that goal setting represses any critical individual reflections and excludes those with a different mind-set. Moreover, it contrives to eliminate pluralism and the associated conflict of values. It consequently promotes a totalitarian remedy to an existential problem, instead of developing a societal culture in which individuals learn to appreciate and to struggle with diverse views and experiences. Educational institutions should therefore

welcome conflict and resistance, and should perceive them as a sign of a healthy change process that provides stakeholders with the opportunity to deal with the emotions of change (Fullan, 2001). Fullan also argues that leaders who surround themselves with only like-minded people trade off a smooth beginning for failed implementation.

The fourth question is what types of goals are likely to be promoted when adopting the corporate techniques of setting clear goals. It seems that these are increasingly defined as instrumental and narrow and that they tend to focus on the short term and the quantitative, at the expense of the broader, more qualitative and long-term goals (Bottery, 2000). Moreover, when targets are set beyond the reachable, they tend to exclude or stress those who cannot attain them.

Simkins (2000) compares the bureau-professional agendas to those of new managerialism. He maintains that the former are based on the needs of individual clients and client groups as interpreted by the professionals. The latter focuses on organisational objectives and outcomes, as defined by managers in response to their interpretations of the environmental forces which the organisation faces. There is therefore the perception that the norms of bureau-professionalism are defined in terms of the well being, needs and rights of clients, while those of managerialism are based on concepts of efficiency, organisational performance and customer orientation.

The fifth question that the notion of setting clear goals raises, is how to achieve these goals. In the new managerialist way of thinking it is not enough for goals to be articulated clearly at the top – it is also important that the culture of the organisation will be changed to achieve these goals. The attempt to change the culture of an organisation is referred to as "internal marketisation" (Hartley, 1999) or "corporate culturism" (Willmott, 1993). It aims to shift bureaucratic control towards techniques of ideological control, based on the manipulation of company culture (Hatcher, 1994). This means that the educational system has to achieve compliance not by coercion but rather by the development of a "corporate culture"; the control of the workforce therefore becomes subtle and indirect. In this form of control, or governmentality, employees are encouraged to identify with the corporate goals by internalising new attitudes until they can no longer see contradictions or injustices within their organisation. This approach attempts to determine how staff think and feel about their work, which sometimes requires managing the hearts and souls of employees (Hochschild, 1983). In this view, the art of management becomes

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manipulation. It demands loyalty from employees and at the same time it excludes, silences, punishes or harasses staff who do not appear to have "appropriate attitudes" (Willmott, 1993; Pollitt, 1993). On the other hand, those who devote themselves to the realisation of key corporate objectives would derive a sense of meaning as well as material incentives. Gunter (1997) likewise criticises the manipulative use of management techniques. She claims that these strategic tools provide organisations with a false sense of certainty and will fail to rescue an organisation, mainly because they disregard history and context and because they fail to understand how history provides a counter culture to the consensus-building approach.

This section suggests that researchers are sceptical as to whether the rational managerialist approach, which requires organisations to define shared goals and missions, is workable in educational settings, desirable, inclusive or ethical. It is argued that clear goal setting fails to give recognition to the complexity of change and to the people who work in an organisation. Moreover, it tends to focus on like-minded people by ignoring those with different ideas. This points to another contradiction within the managerial discourse that advocates both exclusion and inclusion. Decentralisation is offered, based on its responsiveness to the diverse needs of the community. At the same time, the articulation of clear goals has the unintended consequence of narrowing the borders of the community so that goals can be pursued more efficiently. It therefore seems that the same contradictory pattern of new managerialism emerges. The gains that the drive for democracy, choice and decentralisation intend to achieve are taken away by the imposition of organisational cohesiveness and defined goals and borders, thereby creating homogeneous organisations where comparison and competitiveness between employees can be identified and regulated. Control over the market may be achieved through standardising measurements, examinations, textbooks, performance indicators, contracts and other accountability mechanisms. These will be discussed in the next section.

Accountability

Accountability is a central feature in new managerialism. Like any private business in the free market, schools live or die depending on their results. Schools and teachers must therefore demonstrate that they can influence pupils' outcomes. This calls for visibility and transparency.

Educational accountability includes at least four parts: information about the performance (test scores, etc.); standards for judging this performance; consequences (rewarding success and punishing failure); and an agent or constituency that receives information on the performance, judges the extent to which standards have been met and distributes rewards and sanctions accordingly (Newmann et al, 1997). It is assumed that an accountability system based on these four parts will motivate teachers to work harder and to become more effective in meeting clear goals for student performance. Linked to that is the introduction of a *contract of performance*, where quality assurance will be achieved by detailed performance targets.

This type of accountability is best described as external accountability, as teachers are held accountable to an outside body. External accountability relies on performance indicators. It excludes non-observable and non-quantifiable features of education and ignores the unintended effects of learning in favour of the predictable and the measurable (Elliott & Crossley, 1997). Subsequently, accountability may exclude essential aspects of teaching that are not easily measured or even noticed, such as a caring approach to pupils or the human qualities and the emotions that teachers bring into the teaching situation. External accountability is distinct from internal accountability, whereby teachers are held accountable to each other and to other stakeholders by their shared responsibility, expectations and values (Abelmann & Elmore, 1999). Research supports the view that internal accountability, which is based on a strong normative environment and on a belief in the capacity and efficacy of teachers and principals to affect students' learning, is more related to school performance than to external accountability (ibid).

While it is difficult to argue against the logic that schools should be accountable, it is unclear how this is to be achieved (Astiz et al, 2002). Accountability is a specifically ambiguous concept since there is no clarity with regard to *'who is to be accountable to whom for what'* (Elmore, 1993:45). Moreover, the implementation of accountability mechanisms is a complicated process (Fuhrman, 1999; Abelmann & Elmore, 1999; Newmann et al, 1997). Fuhrman (1999), for example, maintains that in theory, the new accountability gives schools much autonomy – as long as they perform. However, when the outcomes are not satisfactory, accountability serves to strengthen the involvement of the central agency in local affairs, a point that was also taken by Simkins (2000) and Scribner et al (1994). Fuhrman (1999) challenges policy makers and educators to deal with the inherent conflicts and contradictions of external

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accountability systems by devising a new accountability system that will provide more flexibility to the schools to maximise student performance.

Critics of new managerialism view accountability as a mechanism for the regulation and control of teachers' work. It has been viewed as a device that replaces professionalism and as a mechanism that subjects academics to measurement by performance indicators (Welch, 1998a; Ball 1997a). It has also been seen as a way to transfer the responsibility of effective education (the "means" of education) on to teachers, while allocating the regulatory and monitoring role (the "ends" of education) to central governance (Morley & Rassool, 2000).

Hood (1994) argues that accountability is based on a basic distrust of teachers, and that in order to control the labour of untrustworthy agents, managers have to spell out goals with maximum precision and set up monitoring and incentive schemes. Ball (2000; 1997b) adds that this distrust affects both the institution and the individuals. At the institutional level there is a danger that authentic social relations are replaced with judgemental relations wherein individuals are valued for their productivity alone. At the individual level there is the possibility that commitment, judgement and authenticity within practice are sacrificed for impression and performance. Teachers are perceived to compromise their own judgements about "good practices" and students' "needs" to comply with the rigours of performance, and incur "costs" to the self in this process, such as alienation, inauthentic practice and meaningless relationships.

Accountability may be viewed as another discourse of power provided by those who control the quality of the performance (Ball, 2000). As has been argued before, however, power creates resistance. Ball maintains that as a response/resistance/ accommodation to the "terrors of performativity" (after Lyotard) and the demands for visibility and transparency, teachers tend to use fabrication and to promote a culture of opacity. By paraphrasing Foucault, Ball defines fabrications as the *'versions of an organisation (or person) which do not exist... they are produced purposefully in order to be accountable. Truthfulness is not the point – the point is their effectiveness, in the market or for the inspection, as well as the work they do "on" and "in" the organisation – their transformational impact'* (ibid:9). The paradox of fabrication is that, on the one hand, they are *'an escape from the gaze'* (ibid), but on the other hand fabricating the organisation indicates submission to the rigours of performativity and competition. Fabrication therefore becomes something

to be sustained, and adhering to that replaces authenticity and commitment. As a result, Ball argues, performativity and accountability do not just change what teachers do, but who teachers become. He therefore sees accountability as a struggle for the teacher's soul.

It is feasible to suggest that the attempt to capture teachers' souls is the managerialist alternative for commitment. Traditionally, educators were expected to have commitment to the work, rather than to be subjected to the power of targets, standards, performance indicators and contracts. Commitment is tied up with the notion that teaching is an emotional labour (Hargreaves, 1998). Teachers need to *feel* so they can judge and plan what and how they teach. Moreover, Hargreaves (ibid) found that when teachers are emotionally engaged with their work they are prepared to work beyond the official call.

The notion of commitment must be treated with caution. First, it is idealistic to consider all teachers as committed or involved. Second, a compliant loyalty among colleagues could camouflage incompetence by moving problem teachers and managers around the system instead of confronting them (Hargreaves, 2003). Third, there is also a danger in uninformed commitment (groupthink) when the group goes uncritically with a powerful leader, including only like-minded people and excluding other ways of thinking and being (Fullan, 2001). Leaders therefore need to constantly check against uninformed commitment and at the same time they need to create the conditions in which teachers will cultivate their commitment, bearing in mind that internal commitment and loyalty cannot be activated from the top but must be nurtured by the various leaders at all levels of the organisation (ibid).

In conclusion, accountability, like the other tenets of new managerialism previously discussed, carries its own contradictions. I argue that much depends on how it is implemented, who determines what counts as valuable or effective performance and who decides on the validity of the measures or indicators. By applying the notion of power to the analysis of accountability, it may be viewed as a control and regulatory mechanism that could increase fabrications, inauthenticity and the alienation of teachers from their work. Commitment has been suggested as a contrasting feature, but the limits of this concept have also been noted.

New managerialism and educational stakeholders

I have so far critically analysed the main principles of new managerialism and its inherent contradictions and paradoxes. As mentioned earlier, Pollitt (1993) proposes that new managerialism as an ideology represents a shift in the relations of power between stakeholders, and that it is developed and maintained by social groups such as managers, owners, governments, etc. who may find it convenient to adopt selectively some of its techniques. The purpose of this section is to explore the new roles and positions of managers, teachers and parents in the new managerialist context.

The changing role of the manager

New managerialism glamorises managers, increases their authority and gives them the freedom to manage (Simkins, 2000; Morley & Rassool, 2000; Exworthy & Halford, 1999; Hartley, 1999). The global rise of the "management guru" (Whitty et al, 1998) and the remarkable growth of the education management industry with its technicist "management by ringbinder" approach (Gunter, 1997) are indicative of the perceived significance of management. Management in this approach is seen as a generic skill, which does not require field expertise. It is assumed that all organisations are basically the same, and that they all need to be managed efficiently. Principals are viewed in the same light as the CEO in industry (Grace, 1997). Power is concentrated at the top, either in the hands of the principal alone in small schools, or in the hands of the principal and a like-minded management team in larger schools (Whitty et al, 1998).

It is argued that new managerialism requires strong managers who are "multilingual" in the sense that they can move from the older language of school as a public service to the managerialist language of school management, which includes the language of the market (competition, choice and decentralisation), the language of financial management (cost effective, efficiency, performance-related payment) and the new educational discourse (accountability, standards, outcomes). This involves an ability to argue that these languages are compatible and could enhance good educational practices (Gewirtz & Ball, 2000).

In this view, managers are held responsible for the performance of their institutions, for increased enrolment and for ensuring compliance with demands. Managers are often required to implement efficiently and smoothly goals that have

been set outside the schools by regulating and controlling teachers' work towards the achievement of these goals. In this process the role of managers and their sense of identity are being redefined. It is perceived that the self concept of principals has had to shift from that of educational leader/paternalist/community servant to that of a manager/salesperson of an education commodity (Menter et al, 1997). However, the trajectory and the quality of that shift seem to depend on local and institutional factors, such as the market position of the institution within the local competitive arena, the micropolitics of the school, etc. (Gewirtz & Ball, 2000).

Research is inconclusive as to the extent to which the management of schools is becoming more or less participative (Simkins, 2000). Some researchers observe a tendency towards non-consultative or pseudo-consultative decision-making processes (Gewirtz et al, 1995). Other research identifies a trend towards the establishment of "middle management", that is, deputy heads, coordinators or heads of subject departments (Simkins, 2000). Research evidence suggests that middle managers play a crucial role in mediating change by "buffering" potential conflict between senior managers and academics. The research proposes that the majority of middle managers operate strategically to ensure that their staff is protected and that educational values are promoted as far as possible within the new management culture (Gleeson & Shain, 1999). Some researchers propose that the manager's power should not be exaggerated. For example, Flynn (1999) suggests that subordinates may challenge and evade managerial direction overtly or covertly by various means. Wallace and Pocklington (2002) likewise suggest that the power of the manager is constrained by the agency of other stakeholders and by structural factors that set limits to the extent of the manager's agency.

The response of managers to new managerialism varies. Principals adapt to or resist their changed role (Grace, 1997). This depends on their individual preferences, styles of leadership and their assumptions about the nature of who and what is being managed. Some managers are attracted to the new language and culture of managerialism and perceive it as a progression up the career ladder (Exworthy & Halford, 1999; Whitty et al, 1998; Randle & Brady, 1997; Menter et al, 1997). In some cases it appears that managers make an active decision to use the new managerialist rhetoric for their own ends; some managers even use "bullying" strategies. Other managers have continued to function in the traditional bureau-professional style, combined with a grudging acceptance of market imperatives

(Simkins, 2000). It seems that even those principals who do not believe that the markets or new managerialism are the solutions to all educational ills, have to operate on those principles in order to be able to compete, stay in control and enjoy their enhanced status (Grace, 1997).

Whitty et al (1998) do not assume that managers are the "winners" of new managerialism, as they themselves are being subjected to new forms of accountability. Australia and New Zealand report high principal turnover. Moreover, the nature of their work has changed: it is more intense and focuses on finances, buildings, external demands, issues of "corporate" image and effectiveness (Simkins, 2000; Gewirtz & Ball, 2000; Randle & Brady, 1997). It is important to note that principals are usually drawn from the teaching workforce, sometimes more for political reasons than suitability (Menter & Muschamp, 1999; Reimer & McGinn, 1997). This could make the situation even more complicated for principals as they have to adopt a new value system. Many of them do not have the training or the personality to do so. Engaging in a complex change process without the competency to do so leads to low self-efficacy, insecurity and a tendency to revert to more centralised decision making, thereby reintroducing the problems of centralised bureaucracy (Reimer & McGinn, 1997). Linked to this is the supposition that managers may welcome cultural homogeneity and subsequently the absence or removal of ideas, people and situations that challenge them or their new authority within the context of new managerialism (Willmott, 1993).

This notion of a strong manager is criticised on ethical and practical grounds. Grace (1997) advocates democratic governance. He maintains that the call for one strong person in charge of the change process is based on Chubb and Moe's flawed idea that reforms must be imposed on teachers who would naturally resist the introduction of market forces into education, mainly because their jobs are threatened if they and their school do not perform. Grace (ibid) argues that this assumption ignores the effects that such an imposition has on the lowering of the morale and on the feeling of ownership. Fullan strongly advocates that leadership must be cultivated at all levels of the organisation. He warns against the notion of the charismatic "super-leader" who would rescue the organisation in times of crisis. He maintains that this kind of leadership will provide episodic relief followed *'by frustrated or despondent dependency'* (2000:1). Fullan believes that leaders, rather than managers, are the key to successful educational change mostly because of the complexity of educational

change and its attendant emotions. Leaders should have the right qualities, namely, moral purpose, understanding of change, the ability to build relationships, to create and share knowledge and to tolerate ambiguity while pursuing coherence.

Moral and ethical management of schools is about both "ends" and "means". The new managerialist notion of a strong manager who achieves results emphasises the "ends" but pays less attention to the "means". In this context Bottery (2000) argues that because managerialism makes the periphery responsible for the implementation of policies that have been formulated at the centre, it hauls out the ethical core of leadership and reduces it essentially to a technical-rational function.

It is claimed that the practices associated with new managerialism increase the professional and social distance between those who manage and those who are managed, that is, teachers, due to the division of values and purposes (Gewirtz & Ball, 2000; Hartley, 1999; Whitty et al, 1998; Woods et al, 1997; Elliott & Crossley, 1997; Randle & Brady, 1997). This cultural distance is created since senior management needs to adopt corporate views, while teachers' prime concern is the needs of individual pupils (Simkins, 2000; Fergusson, 2000). There is evidence that in some cases, management and teachers are unable to engage in effective communication or to reach consensus on their contested values (Elliot & Crossley, 1997). Consequently, there is an increase in both manipulation and micro-political activity on the part of heads and their staff (Ozga, 2000). This can impact negatively on any educational reform because positive relationships among the school community are imperative in order to achieve effective change (Fullan, 2001).

The changing role of teachers

Change puts some people in the limelight and others in the shadows (Bascia & Hargreaves, 2000). The new managerialism thinking changes the school as a workplace by shifting power within the organisation and by placing managers at the leading edge of change, while professionals find themselves at the "sharp edge" (Flynn, 1999; Clarke et al, 2000).

As alluded to before, globalisation exerts pressure on schools to prepare students to live and work in the knowledge society. Consequently, Hargreaves (2003) maintains, teachers find themselves caught in a triangle of competing interests and imperatives. First, they need to be *catalysts* of the knowledge society, promoting the skills and knowledge to prepare pupils and societies for economic productivity –

teaching for the knowledge society. Second, teachers need to be *counterpoints* for the knowledge society, concerning themselves not only with performance and cognitive development, but also with cultivating moral, caring and trusting characters – teaching beyond the knowledge society. And third, teachers are also the *casualties* of the knowledge society which has high and diverse expectations of teachers, while at the same time subjecting them to cost cutting, downsizing, increased class sizes, increased working hours and other efficiency-motivated reforms, as well as standardisation and prescribed outcomes. In this scenario teachers are expected to teach despite the knowledge society.

The notion of teachers as the casualties of the new social and economic order is a common thread in the research that explores the impact of new managerialism and marketisation on teachers and teaching (see also Whitty, 1997; Hatcher, 1994). In a market sense, teachers are the source of cost within the organisation rather than an added value (Menter et al, 1997). This would inevitably propel those who manage schools to consider cheaper substitutions, for example, employing newly qualified rather than experienced teachers; utilising a flexible workforce and coercing teachers to work "more for less" (Hargreaves, 2003; Menter & Muschamp, 1999; Whitty, 1997). It is found that new managerialism increasingly marginalises teachers, excludes them from participating in substantive decision making (Smyth, 2002) and de-professionalise teachers (Fink & Stoll, 1998; Woods & Jeffrey, 1996; Bates, 1996). De-professionalisation involves the dilution of the quality of the teaching profession, the lowering of academic standards, the deterioration of teachers' pay, autonomy and conditions, as well as the assessment of performance by external agencies which weaken the professionals' control over their labour (Menter & Meschamp, 1999; Randle & Brady, 1997; Hatcher, 1994). Moreover, under new managerialism teachers are viewed as skilled technicians rather than as reflexive practitioners. As such they are expected to attain specific learning outcomes instead of developing the pupils' diverse potentials; their motivation is perceived to be extrinsic instead of intrinsic and their form of accountability is based on contractual compliance instead of on professional commitment (Whitty et al, 1998).

On the other hand, some research findings suggest that new managerialism also re-skills teachers. For example, re-skilling occurs in the learning of new assessment procedures (Menter & Muschamp, 1999), in learning how to budget and marketise schools and by increasing teachers' flexibility (Hatcher, 1994; Troman,

1996). New managerialism can therefore provide opportunities for teachers to take new responsibility and to pursue the rewards that come with this (Conley & Goldman, 1995). It has also been found to have a positive impact on enterprising teachers who are able to acknowledge the managerialist aspects that can benefit the schools while neutralising the undesirable ones (Forrester, 2000; Shain & Gleeson, 1999; Woods & Jeffrey, 1996).

Recent research on the impact of new managerialism on teachers focuses extensively on the emotional and social effects. It is argued that under new managerialism teaching is no longer seen as a secure occupation and a job for life. This insecurity is reinforced by the increase in short-term contracts and part-time working arrangements, which claim to provide schools with the flexibility to respond to market changes (Avis, 1996; Hatcher, 1994). This has created resentment and tension between those on the permanent staff and those who have had fixed-term contracts (Webster & Mosoetsa, 2001).

As teachers are faced with uncertainty about the future (including the possibility of retrenchment), their main concern becomes their self-preservation. Consequently, it is found that teachers are set against each other as they attempt to calculate their utility value to the school, turning the school into a fractured organisation (Menter et al, 1997; Gillborn, 1994). Research reports that some teachers are so anxious that they constantly watch their backs and tell "bogy" stories about heads and inspectors (Tebbutt & Marchington, 1997).

With the intensification of work, teachers have less time in staff rooms where they used to socialise with colleagues. There is therefore less informal interaction of the kind that induces personal trust. As a result, social relationships in schools become more formalised through such organisational structures as "contrived collegiality", whereby collaboration is mandated rather than facilitated (Hargreaves, 1991). This control and regulation of academic labour has replaced collegiality, trust and professional discretion and has supported a culture of uncertainty and alienation (Deem, 1998; Menter et al, 1997; Webb & Vulliamy, 1996; Hargreaves, 1994),

New managerialism affects personal identities and impacts on teachers' physical and emotional well-being. Some teachers experience increased levels of stress and a breakdown in close and intimate relationships both at work and at home (Troman, 2000). Other teachers react to change by separating the real self from the professional identity and live a double life (Halford & Leonard, 1999). It is found that

teachers present two very different accounts of their views of the change – one public and one private. The public view is positive, while the private view is negative. This contradiction contributes to teachers' stress and low morale (Menter & Muschamp, 1999).

As discussed, new managerialism marginalises teachers, reduces their economic benefit, undermines their professionalism and autonomy and creates strained relationships between teachers and managers. At the same time, it is important for management to demonstrate that teachers support the managerial regime, that they are accountable and that there is consensus on the shared goals and the means to realise them. In order to manufacture this image there is a growing engagement in the internal marketisation of the relationship between managers and teachers. The worker/teacher may become regarded as an internal customer who needs to be "enchanted" by the manager/principal. It is assumed that once teachers become satisfied customers, they will make pupils happy. This internal marketisation has been seen as a new rhetoric of compliance in the management of teachers, whereby emotions are instrumentalised for performative purposes (Hartley, 1999). Willmott (1993) is highly critical of this tactic, which he perceives to be another corporate technique to achieve compliance. He maintains that in the corporate cultures of new managerialism, employees do not only have to act in a technically competent manner but also have to think along these lines. In this context even criticism is considered to be disloyal. Employees must "buy in" or "get out". Consequently, their democratic rights and their freedom of speech and thought – with the challenges and insecurities that they bring along – have been curtailed.

Research and observation suggest that teachers both resist and comply with changes. Their resistance can be overt, covert or subversive (Randle & Brady, 1997; Elliott & Crossley, 1997; Troman, 1996). It is suggested that teachers eventually stop resisting because of fatigue and concern with their own professional survival (Gillborn, 1994). Compliance, on the other hand, does not mean that innovations will be implemented in full. Compliance may breed mediocrity as teachers might change just enough to win in the market place or to receive the desired incentives (Sergiovanni, 1998). Some teachers have lost interest in their work or have left the profession (Chisholm, 1999; Woods et al, 1997; Menter et al, 1997; Troman, 1996). Others are reported to become sceptical and to adopt a passive "wait and see" attitude (Conley & Goldman, 1995).

Woods et al (1997) summarise the different modes of teachers' reactions: *the supportive conformists* – these are pragmatic teachers who learn to pace themselves differently according to the new demands; *the surviving conformists* – those who lose their spontaneity and vision and feel reduced to a "machine"; *the disturbed conformists* – the angry and cynical; *the non-compliants* – those who are defiant, confused and try to reclaim other areas of their lives; *and diminished individuals* – those who have been reduced to struggling for survival in a damaging context.

In conclusion, new managerialism comes with a fundamental distrust in teachers. It aims to reduce the cost of teachers and teaching and therefore requires teachers to work "more for less". Teachers' autonomy is taken away and there is an attempt to control their labour externally by contracts, performance criteria, specific outcomes, the setting of clear goals and other accountability measures. This discourse is mostly criticised in the literature as it contradicts the previous discourse of professionalism and exacerbates a situation whereby teachers are demoralised, demotivated and disillusioned.

While the discourse of new managerialism has systematically disadvantaged and pressurised teachers, it claims to give more power to parents and the community. This is based on the notion that new managerialism shifts the discourse education from the "provider capture" to the "consumer capture". The question is whether, in practice, the parents and the community are the real winners of new managerialism. This is the topic of the next section.

The changing role of parents

Decentralisation goes hand in hand with the call for greater parental choice and participation in schools. There is, however, an increasing sense of confusion and puzzlement among parents with regard to their role in the education of their children. Are they supposed to be supporters, partners, co-educators, governors or customers? (Bridges, 1994). Bridges allocates to each role different levels of participation as well as its own conflictual characteristics.

Parents as supporters are required to support the work of schools by ensuring that their children act in accordance with school requirements as far as dress code, attendance and homework are concerned. Parents need to support school events, contribute to school funds, become members of a PTA (Parent–Teacher Association), etc. In this notion parents are expected to routinely support the school regardless of

whether they are able to choose the school for their children, whether their values and goals are compatible with those of the schools, and whether the schools offer them opportunity for participation in devising the school mission.

Parents as partners are seen as participants in the education process: it implies a move towards more equal distribution of power in the relationship between parents and schools. This partnership can only directly engage a small number of parents. The notion of parents as partners is based on the recognition that real support needs consent and responsibility. Parents therefore need to be actively involved and take responsibility for all aspects of schooling. However, this seems to be more rhetorical than practical and could be easily manipulated. This point is raised by Thody (1994a) who maintains that the perception of democracy and empowered citizens is mostly illusionary. She questions whether the motivation behind the rhetoric of delegating more power to parents is to obscure where the real power in fact lies or another way by which the government can cut its expenses by getting *'volunteer, part-time, unpaid, public servants'* (ibid:13). Arnstein (1969) likewise argues that citizen participation and their level of involvement can be described along a continuum starting from the level of non-participation, whereby authorities manipulate and offer empty rituals of participation without any real power, to a higher level which offers varied degrees of tokenism, such as informing, consultation or placation, to the highest level of citizen power, in which she includes partnership, delegation of power and citizen control.

Parents as co-educators are, together with the teachers, held responsible for their children's academic achievements. The main features of this category are a sharing of power, mutuality, shared aims and goals, joint action with parents, professionals and pupils working together and responsive dialogue. Again, this seems to be more rhetoric than practice (Bridges, 1994).

Parents as governors – Bridges (ibid) refers to the United Kingdom experience whereby parents as governors became a movement in the marketised context of the 1980s and 1990s. He maintains that a large percentage of these parents are bewildered by the new responsibilities and lack the stomach for sometimes politicised conflicts; that there is little measurement of accountability and that most parents-governors do not feel empowered by their positions. Again, parents as governors could only relate to a small number of parents, and they are supposed to represent community rather than individual needs.

Even though governing bodies is a relatively recent phenomenon in South Africa, there is research evidence that their achievements are uneven and are contingent on social conditions (Karlsson, 2002). These findings echo research from New Zealand (Robinson et al, 2003) and the United Kingdom (Thody, 1994; Deem & Brehony, 1993). Deem (1996), who views governing schools as a political activity, argues that decentralisation has given greater local control and autonomy to lay people who are not expected to have any educational expertise. She further maintains that governors are often co-opted rather than elected; that they are usually those who have the time, money and cultural and political capital to enable them to assist others in a voluntary capacity, and that their outlooks are therefore not always consistent with the individuals they are supposed to represent. She concludes that governing bodies are neither particularly efficient nor democratic and that the decision-making process does not ensure full participation. Robinson et al (2003) refer to the capacity of the governing body to perform their roles. They argue that capacity does not only relate to individual capabilities but is dependent on the match between the individuals' abilities, the functions that they are supposed to fulfil and the organisational structures that can support these functions. They assign a greater role to the government in developing local capacity in order to make governing bodies both democratic and effective.

Parents as customers/consumers – The notion of parents as customers represents a radical change from all the other roles. As customers, parents are clients for a service that is provided by someone else. They are perceived to have a greater control over, and choice in, the education of their children, described elsewhere as "parentocracy" (Brown, 1990). The paradox is that parents have the choice, not to participate, but to complain if they are not getting what they want, or to choose another institution. This concept marks *'the triumph of individualistic ethos of competition for personal self-interest over the collectivist ethos of collaboration in the interests of general welfare'* (Bridges, 1994:73). As discussed before, parents are, however, not informed customers.[6] Hartley (1999) maintains that parents often do not make rational choices based on objective evidence and that other factors may apply, mostly based on emotional, irrational or intuitive criteria.

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[6] See also the discussion on schools as quasi market earlier in this chapter.

Whereas in the past, discussions around parents and schools have focused on how parents should fulfil their responsibilities as co-educators, the new managerialist discourse outlines the obligation of schools to fulfil their responsibilities towards parents (Whitty et al, 1998). The relations between schools and parents have become contractual. Whitty et al maintain that in many cases these contracts tend to ensure that parents will support schools and that they have the right disposition towards school policies. So while these measures are usually presented as a mechanism by which market forces make schools more accountable to parents, in some cases they use the notion of partnership to make parents more accountable to schools. It is possible, Whitty et al argue, that we are witnessing not only the commodification of students but also the commodification of parents. Linked to that is Hargreaves' (1997) observation that when parents are clients and consumers, the contractual relations between them and the school tends to fracture the community sense, privileging one section of the community, while marginalising others.

Deem and Brehony (1993) argue that the notions of consumer and parent power seem to militate against harmonious partnerships between schools and parents, where consensus is most likely to be achieved in situations where the issues under debate are not directly related to teaching and learning. In another study, Deem (1994) reiterates that the conceptualisation of lay participation as consumers decreases the amount of democratic involvement in the educational system and tends to privilege private, individual interests over the wider public interests.

The emphasis on individual interests over public interests poses a particular challenge to the Catholic Church, which resonates with my study. The essence of the conflict is the gap between the individual rights of parents as consumers, and the Church's position by which an emphasis is given to the Church and the community in determining the direction of their schools (Arthur, 1994). There is the possibility that the parents as either governors or customers could change the Catholic character in a school since they could technically take over the governance of these schools and impose their own ethos. The conflict, as Grace (2002) points out, is between an essentially authoritarian and hierarchical leadership, which takes the role of defender of the community and "public good", and between groups of school governors and parents who claim to be the democratic voice of lay involvement on the future of Catholic schools. This conflict is further complicated by the Church's emphasis on the role of the family in the education of their children, which contradicts its tendency to

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exclude parents with different voices from the administration of the schools (Arthur, 1994). In the past, when this conflict was brought to test and after parents were prepared to "take the cardinal to court", the Church conceded to the parents. This has been perceived as a clear victory for the marketisation process and for the ideology of "parentocracy" in the United Kingdom (ibid).

In summary, as market forces and the discourse of new managerialism increasingly influence education, the relationship between parents and schools has been redefined. It seems that parental entitlement emanates from the right to choose rather than to participate in the management of schools. The parents' role has shifted from the more democratic conceptions of parents as partners or co-educators to being customers and governors. It is argued that both these positions have had intended and unintended consequences for education. In many cases these are dependent on local and institutional conditions as well as on political expediency.

This narrative further suggests that the changing role of parents towards the concept of customers is especially intricate in the context of faith-based community schools, where parents' rights challenge what has been perceived to be the authority of the church. This raises some related questions: To whom does the school belong and whose interests should it serve? These, however, are topics for deep analysis and are not in the scope of this dissertation.

I have argued so far that postmodern influences and globalisation exert pressure on educational organisations to become more efficient, flexible and effective, so they can adapt to changing market conditions and respond to diverse needs. In spite of the research evidence which demonstrates the conflictual character of new managerialism, there are writers from different political standpoints who see its ideology and practices as a logical and rational way to achieve these aims. The expectations are that the practices of new managerialism would destabilise the complacency, rigidity and paternalistic attitudes of bureau-professionalism, and would replace it with an efficient corporate-like management. The question is whether new managerialism can deliver this promise.

New managerialism and the promise of security

In the new managerialist thinking everything is described as certain, objectively recognisable, measurable and therefore comparable. It seems that this rhetoric offers some level of security and certainty in a complex, fragmented and changing world. As

mentioned before, this process – cynically described as the McDonaldisation of society – provides some sense of security by its predictability, standardisation and familiarity. Some scholars, like Bottery (2000), are disturbed by the huge popularity of McDonald's-like products. Bottery sees this as the result of a contradiction within globalisation and postmodernity, which has caused the world to become both controlled and fragmented. He argues that this fragmentation drives people to seek even greater control and direction. In education, there would be little dispute, for example, about the number of children in a class or the number of teachers at a school. It imposes a rigid curriculum in times of growing uncertainty about what constitutes knowledge; it advocates the establishment of common core values and goals despite growing relativism (Hartley, 1997). While cultural uniformity could provide a sense of security and familiarity, it may contradict the new managerialist pledge to be responsive to diverse needs and to be inclusive.

A review of the current research has not provided the evidence to conclude that new managerialism could fulfil its promise to provide certainty and security. The literature demonstrates rather that new managerialism initiates contradictory processes which negatively impact stakeholders. Hartley (1997) maintains that new managerialism will fail because it tries to do the impossible, that is, to provide certainty under postmodern conditions. He doubts whether the professions will "buy into" the strategic goals of new managerialism and assimilate it into their "common sense". Morely and Rassool (2000) also have doubts as to whether new managerialism would provide the promised security. They maintain that new managerialism does not regulate the chaos but sends it underground in the form of failing schools, teacher stress, disaffection and social exclusion. Rees and Rodley are quite candid when they vehemently declare that the claims of new managerialism are fraudulent:

> Managerialism turns out to be a fiction, but a serious and persistent one because of the widespread fascination with theories of management and the status of the managers (1995:15).

As an educationalist who has been socialised in the discourse of professionalism (probably not different to many of the researchers who have been cited in this chapter) and who has been adversely affected by a managerialist reform, I find it difficult to applaud the practices and ideology of new managerialism and of marketisation – it is probably easy to detect this hostility in my tone of discussion. At the same time, like

Simkins (2000), Menter et al (1997) and many others, I do not idealise the situation that existed prior to the managerialist reform. My experience and frustration with educational organisations and their slow pace of change (if at all) make me aware that under certain conditions, such as in the face of fiscal or ideological crisis, radical reform is sometimes unavoidable. It is for this reason that I would like to interrogate the notion of new managerialism not as a form of governance, but as a short-term change process that would initiate a reform whereby institutions would have to change and become more efficient and effective. This is the function of the next section.

New managerialism as a change process

It is widely recognised that different circumstances require different management strategies (Fullan, 2001; 1999). A technicist approach based on a rational epistemology of change and strong management might be useful to rescue an organisation from chaos. Fullan (2001) disagrees. He maintains that in times of crisis we should not call on a strong manager with all the answers, techniques and decision-making power, but rather it is a time for real leadership to emerge that will help the institution to solve complex problems. While Fullan realises that coercive-type leadership is sometimes used for urgent crisis situations, he maintains that the long-term effectiveness of the intervention is uncertain, especially as people resent and resist leaders that demand compliance. Thus coercive leadership could achieve short-term compliance, but may fail to achieve internal commitment in the long run. Fullan elaborates:

> When organisations are in a crisis they have to be rescued from chaos. But a crisis usually means that the organisation is out of synch with its environment. In this case, more radical change is required, and this means the organisation needs leadership that welcomes differences, communicates the urgency of the challenge, talks about broad possibilities in an inviting way, and creates mechanisms that motivate people to reach beyond themselves (2001:47).

The practice of new managerialism and its technicist-rational approach to educational change negates what the research has convincingly advocated about change since the 1980s. It is now well-established knowledge that change equals complexity (ibid); that it is a slow process (ibid); that imposing change on unwilling participants does not ensure success (Grace, 1997); and that one cannot mandate what matters (Mclaughlin, 1998). It has been argued that leaders of change need to take into

account the history and context of the institution, and that what really matters are the subjective meanings that individuals assign to the reform and how leaders deal with the emotions of change as well as with resistance (Fullan, 1999). Hargreaves (1998; 1997) strongly urges leaders to pay attention to the emotions of change. He proposes that managerialist-type change, which focuses on targets, performance and standards, would not get to the heart of teaching, which is about establishing bonds and caring relationships with students, parents and colleagues.

Wallace and Pocklington (2002), who extend Fullan's notion of complexity, claim that new managerialism ignores the limits of the manageability of complex educational change and the resistance to it. They maintain that change is complex because it contains so many factors that are beyond any individual understanding, awareness or control. The more complex the change, the larger the range of its components and the amount of interaction between them. Wallace and Pocklington argue that stakeholders may choose different courses of action according to their own values, beliefs, knowledge and interpretations of the situation and their access to power. As a result, no one has complete control over the change, and the consequences of educational change are unpredictable and mostly unintended.

To conclude, this section suggests that new managerialism is limited as a change process and that what might be gained in the short term will negatively affect the long-term goals of the reform. New managerialism is perceived to be a quick fix that could exacerbate the educational problems it purports to solve, and that its top-down approach to policy implementation and change could lead to outcomes far from those intended or expected by its initiators (Trowler, 1998; Hartley, 1997).

More recent research explores the way forward after new managerialism. Whitty (1997) proposes a new role for teachers' unions to counterbalance the forces of the market. He is, however, concerned that the perceived failure of market mechanisms to improve education might bring forward more measures to further marketise schools (Whitty & Power, 1997). Hartley (1997) suggests that the way forward is through dialogue and recognition of differences as well as acknowledgment of the relativity of the "truth". Therefore, the "truth" cannot be imposed but will need to be negotiated by all. Welch (1998a) calls on academics to defend democracy for the benefit of the social good and to counteract new managerialism. Hargreaves (2003) reports on attempts by governments in the United States, England and elsewhere to reverse the marginalisation of teachers and to

reintroduce the concept of teaching as a learning profession. This is an attempt to attract high calibre people back into the profession and to reverse some of the negative effects of managerialism. Grace (1997) suggests that a solution could be found in "active citizenship" – a concept of active public culture in education – a culture that will prioritise the community and public good before market, consumers and individual self-interest.

The notion of school as a community is often raised as the way forward to combat new managerialism and to counteract the perils of globalisation (Hargreaves, 2003; Arthur & Bailey, 2000; Bottery, 2000: Beck & Foster, 1999; Strike, 1999; Hargreaves, 1997; Grace, 1997; Sergiovanni, 1994). The increased demand for community is paradoxically one of the unintended consequences of new managerialism. All the uncertainties of flexibility and contractual work, the absence of trust, care and commitment, the superficiality of teamwork, and mostly the alienation of school staff from the work and from each other, impel people to look for alternative sources of meaning and attachment. Apple warns, however, that this yearning for morals and values can cause education to fall prey to authoritarian populist religious fundamentalists who believe *'that God spoke only to them and to no one else'* (2000:711).

This brings me back to my inquiry, that is, the restructuring of the Jewish community schools. The research explores how faith-based community schools have responded to new managerialism. It asks whether community schools can offset the perils of new managerialism, and under what conditions Apple's forewarning could become a real threat.

However, the notion of community has its own intricacies and inherent conflicts. Before any attempt to understand the meeting point between new managerialism and community can be made, it is therefore imperative to understand the notion of community and to unravel its complex nature, its strengths as well as its limitations.

On communities

The word "community" creates a sense of nostalgia towards an ideal world of kinship, loyalty and friendship. It is *'society with a human face'* distributing social goods where *'we speak the language of "we" instead of "I"…'* (Sacks, 1995:xvi).

This ideal notion of community does not always match the reality; not in the sense of falsity or fabrication, but rather because a community is constructed in the style we "imagined" it (Anderson, 1983). Though the ethos of this *imagined community* is often elusive and implicit, it consists of a real weaving of traditions, beliefs, rituals and stories into a narrative that people speak and act upon (Arthur and Bailey, 2000). The story that a community tells is the way in which the community can understand itself. Belonging to a community means to know its tale. Community is therefore not a hastily gathered collective of friendly people with a common, immediate goal; it is a *community of memory,* defined in part by its past and also by its memory of the past (Bellah et al, 1985 quoted in Noddings, 1996). Belonging to a community – the notion of "we" – is a source of security and certainty. The sense of security is enhanced by the perception that durable communities of memories have strength and resilience, and that they would not fall apart when an immediate common purpose is either achieved or discarded (Noddings, 1996).

There is, however, also a "dark side" to communities – that is, their tendency towards parochialism, conformity, exclusion, distrust or hatred of outsiders, intolerance and coercion (Strike, 2000; Noddings, 1996; Sacks, 1995; Ignatieff, 1993; Enslin, 1990). For Sennett (1998), "we" is a dangerous adjective, used for self-protection and for the rejection of outsiders.

This introduction alludes to two different ways of understanding communities, which are embedded in the persistent debate between liberalism and communitarianism. The debate reflects the tension between *'the needs, desires, rights and duties of the individual qua individual, and those of the individual as member of a community'* (Snauwert & Thebald, 1995). It is beyond the scope of this chapter to explore that issue in depth. The next section will, however, briefly discuss the main difference in the liberal and communitarian perspectives of community.

In the liberal conceptualisation, communities are essentially exclusive entities that marginalise those with different values. The liberal view tolerates communities as long as they are voluntary associations, their values are not obligatory by force and they discriminate on no other basis than the association's constitutive values, which Strike (1999) terms as "substantive inclusiveness". The liberal view prefers to see society as a setting that allows an individual the right and freedom to pursue his/her own needs and to determine the course of his/her life. The individual does not have responsibility to the community but only to other individuals and to the protection of

their rights, for example, freedom of association. Interaction between individuals is based on *contracts*, policies and rules that ensure the protection of individual rights and the equal distribution of social goods. These contracts need to be informed by ethical deliberation, but abiding by them demands some kind of straightforward obedience (Beck & Foster, 1999).

The communitarian positive view of the community is less focused on the preservation of individual rights and more concerned with the fulfilment of obligations or responsibilities to the community (Etzioni, 1993). In the communitarian view, individuals have the responsibility to serve the common good, however defined by the particular tradition. Communitarians reject the liberal view that social contracts would create viable communities. They have strongly attacked the liberal traditions for, among others, their neglect of community, their faulty concept of the individual as an independent being instead of as a social and cultural entity and their reliance on bureaucratic structures and procedures. Those who advocate communitarianism maintain that the liberals, by their alleged nihilism, create a "vacuum" in societies, making them vulnerable to fascism and anarchy (Noddings, 1996).

Instead, communitarians assert that common traditions, proximity, shared values and commitment to care provide the glue that holds a community together (Beck & Foster, 1999). They promote words such as trust, mutual responsibility and commitment. The existence of a community claims to strengthen moral standards, to demand the type of individuals that can sacrifice for others, promising that if people obey common standards they will find a mutual strength and emotional fulfilment they cannot experience as isolated individuals.

Liberals, on the other hand, argue that communitarianism ignores the diversity within a community. They question issues of power and control in the community and whether there is room for dissent or individual autonomy. They also highlight fascism as an example of *total community* (Noddings, 1996). Sennett (1998), for example, rejects communitarianism and argues that it falsely emphasises unity as a source of strength and mistakenly fears that social bonds would be threatened when conflicts arise in a community. Sennett argues that strong bonding between people means engaging their differences over time. He further maintains that people are bound together more by verbal conflict than by verbal agreement. He explains that in conflict people have to work harder to communicate and that they would bind together eventually by finding new rules of engagement. Thus the scene of conflict becomes a

community as people learn how to listen and respond to one another not "in spite of", but rather "because of" the differences. In this view there is no community until differences are acknowledged. This view of the communal "we" is far deeper than the often superficial sharing of common values, such as appears in modern communitarianism. Sennett refers specifically to the instant communities that have emerged in the wake of globalisation and the new economic conditions – for example, the temporary communities created for the purpose of teamwork or the corporate shared goals. Teamwork, for instance, does not acknowledge differences in privilege or power and is therefore a weak form of community; all members of the work team are supposed to share a common motivation, and precisely that assumption weakens real communication.

Noddings (1996) maintains that there are ways to avoid the "dark side" of community. One way is to exclude oneself from the community, even though one cannot easily drop out of one's race, religious tradition, family or national heritage. Moreover, when individual members drop out of a community, it does not protect that community from its inherent flaws. Another way to overcome the flaws of a community is to create liberal communities. Noddings doubts whether this is possible, mostly because liberalism does not provide a centre strong enough to hold people together with shared goals. There is no real "we" in liberal thought and a community needs a strong centre; it has to stand for something. Noddings maintains that even when secular humanist groups prioritise liberal values, the glue that holds them together is not their liberal values but rather their common rejection of institutional religion and the desire of their members to belong to a group that shares their beliefs. Ignatieff agrees that the lack of liberal centre curtails the liberals' power to affect change: *'The world is not run by sceptics and ironists, but by gunmen and true believers'* (1993:189).

Another way to avoid the "dark side" of the community is to adopt a third model of the community, which draws from a combination of the strengths of both perspectives (Beck & Foster, 1999; Noddings, 1996). This combines liberalism's concern about the individual with the communitarian's commitment to the creation of social systems that build upon shared values such as mutual acceptance, care and respect.

Bringing this argument to the educational arena, Strike (1999) explores the middle way in educational communities and argues that it can be maintained when a

school adopts "thick", but "vague", constitutive values that can accommodate diversity. Constitutive educational values, according to Strike, are those that generate a conception of good education and communal projects to pursue it. In the case of religious schools, where practices are based on *comprehensive doctrine* or *tradition*, the balance between shared values and inclusiveness is fragile. Strike (ibid) refers to a study of Catholic schools conducted by Bryk et al (1993) who maintain that the success of these schools is attributed to the fact that they are not narrow sectarian institutions, but rather institutions that incorporate secular-humanistic constitutive values. They are therefore able to accommodate a significant degree of cultural and religious diversity in spite of tensions and dilemmas. Grace (2002) agrees only partially with these findings and argues that it is optimistic to believe that there is no indoctrination at Catholic schools. Given the paucity of detailed school-based educational research on religious schools, there is no confirming or disconfirming data.

In spite of the debate and lack of empirical research, I intuitively concurs with Strike (2000) that faith-based community schools are not inherently illiberal and that they could become the middle way between liberalism and communitarianism if the balance between "cohesion" and "diversity" would be managed, if they would not function as a "total community", and if their educational leaders would draw on the strengths of both perspectives. It has been observed, however, that there is a tendency for schools to draw on the weaknesses of these perspectives. Schools that are managed by contracts, rules and structures to enforce them therefore become too concerned with creating a unified citizenry that fits into a narrow worldview (Beck & Foster, 1999). In the context of faith-based schools this can mean that schools might lose sight of the fact that even religious communities are non-monolithic and are composed of, and exist for, people with a range of needs, beliefs, wants, hopes, and varied levels of practice.

Strike (2000) correctly maintains that *'the devil of schools as communities is in the details, not in conception'*. Noddings (1996) adds that whether a community is "good" or "bad" depends on the morality of its shared norms and the means to ensure conformity to these norms. There could be no separation between the "ends" and the "means" of educational institutions. It therefore seems that much depends on how the institutions operate, how they balance shared values and inclusiveness and how they affect the students and the broader community.

The next section explores the functioning of community schools, looking at what may shape their ability to become the middle way between liberalism and communitarianism.

The functioning of community schools

To understand the different ways in which communities function, many scholars turn to the classic distinction between *gemeinschaft* (community) and *gesellschaft* (society) made by the German sociologist, Tonnies, in 1887.[7] *Gesellschaft* refers to more formal, contractual organisational relationships. Presently it is the world of the market and new managerialism. *Gemeinschaft* refers to informal kinds of collective relationships usually associated with communities. Because they are based on shared values, rituals and memories, communities give people a sense of belonging. This sense is more lasting and secure than any associated with the contractual relations of *gesellschaft*.

In *gemeinschaft* people remain united in spite of separating factors, whereas in *gesellschaft* they are essentially separated in spite of unifying factors. In *gemeinschaft* both people and practices are valued intrinsically, whereas in *gesellschaft* they are valued instrumentally. In *gemeinschaft* interactions with others are intimate, governed by love, friendship, familiarity and mutual enjoyment of shared practices, whereas in *gesellschaft* members seek their own benefit and are strangers to each other. Interactions between members of the *gesellschaft* are kept at arm's-length, governed by contract and law. Shared understanding is a crucial element of *gemeinschaft*. Understanding is tacit and implicit and created by the intimate relationships between members of the community. While contracts depend on mutual agreements, understanding is the very opposite of a contract and is the precondition for all forms of community (Strike, 2000).

Tonnies's classical categorisation is criticised by Strike (2000) and others for his underestimation of the diversity of types of communities and the variability of social glue that holds them together. Strike also comments that in Tonnies's account, *gemeinschaft* communities are total communities, which control all aspects of one's life (work, recreation and family life). Strike argues that this type of community does not exist in modern life, except in extreme cases such as the Amish communities, and

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[7] This analysis of *gemeinschaft* and *gesellschaft* is based on articles by Beck & Foster, 2000; Strike, 2000; Noddings, 1996; Furman & Merz, 1996; and Sergiovanni, 1994.

that *gemeinschaft* values are therefore essentially describing a premodern society. Scholars have emphasised that *gemeinschaft* and *gesellschaft* represent ideal types that in fact do not exist in their pure forms and should be used as conceptual tools to categorise and explain certain reforms as well as to track movement along a continuum. Noddings (1996) and Sergiovanni (1994) rightly argue that the *gesellschaft* values are not all bad and that school communities need to possess characteristics of both *gemeinschaft* and *gesellschaft.* However, Noddings reaffirms Tonnies when she states that as the institution moves towards the *gesellschaft* end of the continuum, the *gemeinschaft* values become weaker and the longing for community pushes people into a search for associations that will satisfy their need to belong.

A central issue in this case study is whether globalisation and the attendant ideology of new managerialism have changed the way in which faith-based community schools function. As has been argued before, the new economic order has strengthened both the *gemeinschaft* and the *gesellschaft*, that is, to use Benjamin Barber's catchy phrase (2001), both the McWorld and the Jihad. Both offer a sense of security and stability in a changing world. Thus, on the one hand, a great number of schools have adopted the market ideology and new managerialism, and have increasingly committed themselves to the values of a *gesellschaft* society. As alluded to earlier, there is a risk that in this scenario rules, procedures, laws and contracts would replace personal judgements and commitments and would devalue the ethos of care, thereby weakening the *gemeinschaft* values of schools.

On the other hand, globalisation has unleashed a parallel strong pull towards *gemeinschaft* values. The danger is that in the wake of economic and cultural globalisation communities might define their borders too narrowly. In this context, schools, and especially those based on faith, might adopt the negative view of community. Instead of providing their pupils with their particular worldview or cultural identity as a starting point for autonomy and liberal citizenship, they might seek to entrap their pupils in a particular narrow vision of the world. These schools pose a threat to individual autonomy by using coercion, or even "gentle" methods of persuasion, and in the long run may close the mind of the new generation to reflection and critical thinking. In this scenario we could witness the establishment of schools with a distinct illiberal character shifting towards the "dark side" of the community. That was the reason for Noddings's (1996:267) appeal to educators to reject an

uncritical call for community and to look at both good and bad examples of communities, in order for them to make an educated decision about their schools.

This case study, that is, the restructuring of the Jewish community schools, provides one example of community. It explores the response of faith-based community schools to marketisation and managerialism. It asks whether schools can apply the cold logic of the market (*gesellschaft*) without losing their sense of community (*gemeinschaft*). It explores whether members of a community, placed under contractual relationships, could still retain their commitment, closeness and informality. I will argue, contrary to Noddings, that the *gesellschaft* values of the global social order do not replace the *gemeinschaft* values, but rather that they undermine the old type of community values and force it to change.

As has been mentioned before, one should not assume that the consequences of te restructuring of Jewish community schools are already known, as these are dependent on the combination of global and local, the history of the institution, the social and ideological forces in and around the institution, the level of its capacity and leadership and what course of action would be taken by the different stakeholders as well as their access to power.

In order to follow the trajectory of the change initiated by the restructuring of the Jewish community schools along the *gesellschaft–gemeinschaft* continuum, I will develop a bipolar framework that will contrast certain tenets of new managerialism with features of community schools. This will be the aim of the next paragraph.

New managerialism in the context of community schools – a conceptual framework

It is argued in this chapter that there are many structural and cultural differences between the discourse of community (especially as it tends towards the "liberal" notion of community) and the discourse of managerialism in education – as Table 1 illustrates in ideal-type form. This exposition formed the basis for theorising about the origin and nature of the restructuring of the Jewish community schools and the experiences of stakeholders in that process.

Table 1 – Ideal-type differences between the communitarian and managerial approaches to schools governance.

The community discourse (*Gemeinschaft*)	The managerialist discourse (*Gesellschaft*)
School as a social good. Education is public interest.	School as a business. Education is a commodity.
Centralised, hierarchical system.	Decentralised system. Stakeholder society.
Decision making through a combination of bureaucratic rules and professional autonomy; consultative.	Managerial decision-making is a top-down process formulated by managers. Managers tend to use specific management techniques, mostly corporate techniques, to make decisions.
Building community over time by professionals from the field of education. It is a "community of memory".	Building organisations, such as a community school, is a generic skill. New, instant identity.
Emphasis on community needs. (Thick democracy)	Emphasis on individual rights. (Possessive individualism)
Emphasis on care and responsivity to community needs.	Emphasis on efficiency and effectiveness.
Loyalty to members of the community, to the profession and to public service.	Loyalty to the organisation.
Implicit shared values.	Explicit goals and mission statement.
No separation between "ends" and "means".	"Ends" are separated from "means".
The community is where one belongs, choice is limited (parents as partners or supporters).	The individual can choose the organisation according to needs and affordability (parents as customers).
Informal relations based on collegiality, trust, mutual obligations, emotional and normative ties.	Formal relations based on contracts and "contrived collegiality".
The balance between cohesiveness (exclusiveness) and diversity (inclusiveness) is maintained.	Claims diversity and inclusiveness. In practice – homogenisation and exclusiveness.
Intrinsic value for the individual as a member of the community.	Instrumental value for the individual.
Performativity is in relation to the "community of practice" in a loosely coupled organisation.	Performativity is controlled by indicators and surveillance.
Commitment (internal accountability).	Accountability (external accountability).
Produces uncertainty because of the conflicts and micropolitics inherent in a democratic process.	Provides certainty by its predictability and clear direction.

The model presented in Table 1 illustrates the tensions between "management culture" and "community culture", which stem from the basic conflict between the view of school as a business, and the view of school as a social good. It is therefore suggested that market-led reforms are likely to conflict with traditional culture and values in faith-based community schools. It is suggested that a top-down restructuring might have short-term benefits, especially for the financial viability of schools, but is likely to impact negatively on the sustainability of the reform, its educational benefits

and community values. Marketisation and managerialism are likely to shift the emphasis on cultural and traditional values, such as community and shared needs, to the commodification of schools' products and services. It heralds a shift from the needs of the consumers, to competition with other schools, whereby the schools are likely to become "institution responsive" instead of "customer responsive". Managerialism is likely to exacerbate the contradictory value system and threaten the fragile democracy that could exist within the ethos of "liberal" faith-based community schools: individualism and competition alongside values of collegiality, loyalty and commitment. Furthermore, since marketisation inevitably generates role and value conflicts amongst stakeholders, it is likely to impact negatively on the school community, as it might generate diverse responses to the restructuring. For example, teachers might resist and struggle to adapt to the new managerial culture, while parents might accept, even celebrate, the emphasis on efficiency, effectiveness and performance-based pedagogies.

My thesis is that while some tenets in these discourses contradict each other, synergies also exist. These synergies tend, however, to pull the discourse of the community towards what has been described as its "dark side". For example, when the managerialist notion of clear goals is applied in a community context, it could narrow the borders of the community and exclude those with different opinions or certain qualities. The managerialist promise of certainty provided by explicit laws and rules, could create a homogenous community with a strict code of conduct where debates and conflicts are not welcome; accountability could turn into blind commitment and the culture or performativity could alienate teachers from their own community. This dissertation will test that thesis.

In the introduction to this chapter I suggested that in order to understand the restructuring of the Jewish community schools it is necessary to attend to both the global and the local conditions. Fullan (2001a) similarly maintains that complex educational change is about the small picture – which is the meaning (or lack of meaning) that individuals make of the reform – and it is also about the big picture. In order to understand the restructuring of the Jewish community schools it is therefore essential to understand the global, local and institutional conditions for the change. The next chapter will provide the ideological (Judaism and Zionism), national (South African), local (Jewish community) and institutional (Jewish community schools) contexts of the restructuring.

Chapter 3
The global and local contexts

The purpose of this chapter is to explore the global, national and local contexts within which the restructuring of Jewish community schools in South Africa can be understood and explained. National education policy after 1994 has been influenced by South Africa's transformation to democracy as well as by the two dialectical global processes described earlier, that is: the force towards marketisation and new managerialism; and the parallel force towards the strengthening of local and national identities. Thus, while the South African Schools Act of 1996 (SASA) signifies a move towards privatisation and decentralisation, the product of education was envisaged to be controlled by a centrally designed, outcomes-based Curriculum 2005 (C2005). The national curriculum aimed at creating a new South African national identity based, among others, on the democratic ideals of cultural diversity, tolerance, an open society and the teaching of religion instead of religious education.

The emergence of a new national identity has been perceived as a threat to the preservation of Jewish identity in South Africa; an identity that was artificially maintained by the apartheid regime with its emphasis on separate development based on ethnicity (Rubenstein, 1995; Shimoni, 1988; Hellig, 1984). The Jewish community has therefore been caught in the global tension between pluralist/liberal forces that aim to bridge the differences between people by creating "unity in diversity", and forces emphasising the rights of communities for self-preservation and separateness.

The dilemma of the Jewish day schools in the new South Africa has been aggravated by ideological and political processes in the global Jewish world, in particular the tension between Judaism and Zionism. This tension has been amplified in the past decades by the emergence of Jewish fundamentalist-type groups and the decline of Zionist ideology.

In addition, the political conflict in Israel has highlighted the tension between ethnicity and democracy (Aviv, 1993).[1] While ethnicity is exclusive, a democratic nation means equal rights to all citizens (including non-Jewish residents) and the acknowledgement of pluralism and diversity. Democracy is therefore perceived by some as a threat to the Jewishness of the Jewish State that jeopardises its *raison d'etre* as being a

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[1] When a Jew is not a Jew. *Mail & Guardian*, 3– 9 January 2003.

homeland for the Jewish nation. There is a contradictory view that keeping Israel Jewish is an undemocratic process that ignores the rights of others (The Jewish Agency for Israel, 2003).

These global and local processes have initiated a crisis of identity for the Jewish community in South Africa; a crisis that has infiltrated its educational institutions and has forced them to change. This chapter therefore provides the contextual explication that will shed light on the text and trajectory of my particular study – the restructuring of the Jewish community schools.

In pursuing such contextualisation, this chapter is divided into three sections. The first section sketches the ideological and political context for the Judaism–Zionism debate. A detailed treatment of these concepts goes beyond the scope of my research; I will highlight only the factors that are relevant to my inquiry. I then move on to describe how these global processes have been translated and interpreted by the Jewish community in South Africa. In this context three main historical factors that have shaped the character of the community are underlined, namely: the power of Zionist ideology and institutions; the community's unique expression of religiosity along with a marked hostility towards Reform Judaism;[2] and the pressure towards homogenisation of the community.

The second section deals with the dual educational context within which the schools operate, that is: the Jewish education context; and the South African context. A selective historical overview of the community's educational institutions will demonstrate how both the Zionist–Judaism debate and the policy context in South Africa have shaped the development of these institutions and their expression of Jewish identity. This explication helps to locate the restructuring of the Jewish community schools within the larger transformation of the South African educational system and within global processes.

I end this chapter with a snapshot of the Jewish community and its reaction to the local and global changes occurring at the beginning of the 21st century, during which time the restructuring of the community schools took place.

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[2] Reform Judaism (Progressive Judaism) is a religious movement that advocates the modification of Orthodox tradition in conforming to the exigencies of contemporary life and thought. The essential difference between Orthodox and Reform revolves around the authority of the *Hallacha* (the entire corpus of Jewish laws). Whereas Orthodoxy maintains the divine authority of the *Hallacha,* Reform Judaism subjects religious laws and customs to human judgement and thus maintains the right to adapt and change Jewish tradition to make it more relevant to each generation. The Reform movement was formed in Germany in the early years of the 19th century. By the 1990s, it claimed to be the largest of the Jewish religious movements in North America. Leaders of the Reform movement are usually steeped in secular, as well as Jewish, learning. Services are conducted in the vernacular, and women can participate in singing and praying.

The global political and ideological context

Jewish education in South Africa has been shaped by the political, social and economic processes in two geographically distant places – South Africa and Israel – wherein critical events occurred simultaneously.[3]

In 1948, when the State of Israel was established, the first Jewish day school opened its doors in Johannesburg. In that same year in South Africa, the National Party won the general elections and thereafter instituted the apartheid regime and its Christian National Education policy.

During the early 1990s, both nations experienced profound political and social changes. In 1994, South Africa held its first democratic elections and Nelson Mandela was elected president of South Africa. The abolition of apartheid in South Africa meant that the country was moving towards becoming a democratic and multicultural society. This transformed South African society, and the Jewish community had to adapt to a new social and economic order.

In 1993, Israel signed the Oslo Accord which gave Palestinians limited self-rule in Gaza and parts of the West Bank. The strong reactions to the Oslo Accord eventually led to the assassination of the Israeli prime minister, Yitzchak Rabin, on 4 November 1995. His assassin was an Israeli; a right-wing religious student. This gave a clear indication of the deep schism in Israeli society.

It appears, therefore, that in the 1990s, while South Africa was rapidly moving towards democracy and the construction of a national identity (Asmal & James, 2001), Israel was in the midst of both an identity and a national crisis (Rozenthal, 2001; Aviv, 1993). The crux of the Israeli national schism is the question of whether the territories that have been occupied by the Jewish state since the 1967 Six Day War should be permanently ruled by Israel or returned, wholly or in part, to Arab rule in exchange for peace. It is not my intention to debate this issue but rather to understand it as a focal point in the Jewish identity crisis and in the emergence of new fundamentalist-type groups in Israel and in the Jewish Diaspora, including South Africa. However, these processes cannot be understood without first examining the origin and ideology of the Zionist movement and its relation to Judaism; and second, without clarifying the notion of religious fundamentalism or extremism, whose resurgence towards the end of the 20th century has surprised many social

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[3] See also Mickelson et al, 2001.

theorists who predicted an opposite movement towards greater secularisation and individualism (Grew, 1997).

Zionism and Judaism

Zionism is a Jewish secular political nationalist movement. It was established in the late 19th century by Theodore Herzl, a Hungarian Jew. The founding congress of the movement took place in Basel, Switzerland in 1897. The Zionists' main argument was that anti-Semitism was the product of the "abnormality" of Jewish life among gentiles and that the existence of a Jewish state, to which all Jews would immigrate, would eliminate hatred towards the Jews and thereby solve the "Jewish problem". The assumption was that once Jews had their own state, they would be able to function as "a nation like all other nations".

Zionism's interpretation of Judaism, Jewish identity and Jewish history has shaped the modern Jewish discourse as a whole and has provided the underlying ideology for the establishment of Israel. It provided Jews with an alternative way of Jewish identity that rebelled against the hegemony of traditional religious authorities. Zionism brought into being a new type of authentic Jew; one who spoke Hebrew and worked the land in Palestine. It rejected Yiddish – the language of the Diaspora – and chose Hebrew as a national language. The young, enthusiastic *Maskilim* (intelligentsia) of the late 19th century – and especially the life-time work of one person, Eliezer Ben Yehuda – started the miraculous revival of the Hebrew language and its transformation into an everyday language. The re-birth of the language corresponded with the re-birth of the nation. In 1905 Ben Yehuda proclaimed:

> Language gives to all beings their own form, it makes them creatures in themselves with their own characteristics and peculiarities. As soon as a community on a particular piece of land speak a particular language, it constitutes a people apart, and the land where that people has settled is the state of that people (Quoted in Dieckhoff, 2003:121).

The Hebrew language helped the Jewish nation to create an "imagined community" based on a sense of common belonging. It was perceived that speaking the same language that was spoken by Moses would further legitimise Zionism. Hebrew also helped to transfer feelings of social togetherness from the religious community to the national one (Dieckhoff, 2003). However, rabbis mostly objected to the secularisation of the Hebrew language on religious and political grounds. Dieckhoff maintains that the rabbis clearly understood that Zionism and Hebrew created an alternative to Jewish identity, which would marginalise religion as the "glue" that ties the community together and substitute it with

culture. Later, some rabbis were able to overcome the perceived contrast between Judaism and Zionism by creating Religious Zionism and its *Mizrachi* movement in 1901, thereby supporting the political but not the cultural goals of Zionism.

By and large most of the Jewish world was non-Zionist or anti-Zionist. Among the latter were members of the *Bund* (Jewish Labour Federation) and other socialist parties, Reform Judaism and Ultra-Orthodox Judaism (Saks, 1998; Patai, 1971). These groups and their rationale for rejecting Zionism will be discussed below:

The social principles of the *Bund* did not favour narrow nationalistic ideals, but rather the worldwide empowerment of the Jewish working class. They also rejected Hebrew and tried to preserve Yiddish as a national language (Sherman, 2000).

Reform Judaism perceives Judaism as a religion, not a nationality. It advocates the integration of Jews into the states and nations where they live. Reform Judaism became popular in the United States and played a central role in the acculturation of Jewish immigrants there. After the Holocaust and the establishment of Israel, their opposition to Zionism turned mostly to support.

The *Ultra-Orthodox* Jews[4] – the *charedim* (literally, "God trembling" or "God fearing") – reject secular Zionism's quest for "normalisation" and maintain that the purpose of the Jews is to be different as Jews were chosen for a special mission in the world. They also believe that Jews can only return to the Land of Israel in the time of redemption when the Messiah will arrive and the Temple will be re-built in Jerusalem.

There are two opposing groups among the *charedim* – the *Chassidim* and the *Mitnagdim*. The *Chassidic* movement originated in the 18th century in Eastern Europe. It was a social movement that rebelled against the elitist religious establishment and its strict attitude towards the law and Torah studies. It emphasised mystical religious expressions and emotional experiences. With the years the *Chassidic* movement has developed its own learning centres, but they continue to keep themselves separate from the secular world. They still adhere to their traditional dress – black coats, black hats, long beards and ear

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[4] Ultra Orthodoxy (*charedim*) is a term commonly reserved to those Orthodox Jews who claim not to make any compromises with contemporary secular culture. The *charedim* are subdivided into different groups. As they seek to defend traditional Judaism from erosion they separate themselves from outsiders, especially from secular Jews and prefer to speak Yiddish. The Ultra Orthodox community strives to expand the scope of *Hallacha* to include the public as well as the private realm. It welcomes the imposition of greater restrictions and hardships. It elaborates on details of the law, such as the modesty of women's dress; women are required to wear sleeves which cover the elbows, while the hemline must cover the knees.

locks (*Pe'ot*) – and they organise themselves in communities around their charismatic rabbis. The *Lubavitchers*[5] represent one of the subgroups within the *Chassidic* population.

The second group, the *Mitnagdim* (literally, "the opponents"), were those who opposed the *Chassidim*. They were traditional Jews who maintained the aristocracy of Torah learning. Their leader was the Gaon Elijah from Villna (*Hag'ra*) and most of his followers were from Lithuania.[6]

The *Yeshiva* (institution of higher religious studies) world of the *charedi* groups, both of the *Mitnagdim* and *Chassidim*, had been totally destroyed in Europe during the Holocaust. Many of those who survived settled in Israel, mostly in the ghettos of Mea Sh'arim in Jerusalem and Bnei Brak (near Tel Aviv), and tried to rebuild their *Yeshivot*. Even though they live in Israel, the *charedim* do not recognise the State of Israel since according to their belief, the state can only be legitimised at the time of redemption. However, as citizens of Israel they have a political voice which they have used effectively to secure funds for tens of thousands of seminary students, to exclude them from serving in the army and to preserve their isolation from society (Efron, 2003).

After the Holocaust and in the early years of the State of Israel, Zionism became the consensus ideology. The delegitimisation of Israel by the Arab world, supported by the communist bloc and third world countries, further united Jews around the Zionist idea. The religious population was a minority that mostly looked up to the secular Zionists and admired their idealism and pioneering spirit. As a result, secular Zionism became an ideological alternative to religion. Since the 1970s, with the Westernisation of Israeli society, this approach has changed. The secular, hedonistic lifestyle, materialism, the perceived lack of family values, the high incidence of crime, the liberal sexual behaviour, increased cases of open homosexuality, and mostly the perception that secular Jews betrayed the Zionist ideology, changed the attitudes of the religious community towards secular Israelis and towards the secular expression of Jewishness. Consequently, religious Zionists, from being on the defensive, turned into a community that looked down upon secular values and aggressively criticised those standards. Their goal became to reshape Israeli society and to establish a new level of morality (Sheleg, 2000).

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[5] Lubavitcher was a small town in White Russia where this sect originated. The various *Chassidic* subgroups usually identify themselves by their town or village in pre-Holocaust Europe.

[6] Lithuania was a province of Czarist Russia. It was an independent nation from 1918–1940 until it became reincorporated into the Russian empire in the form of the Soviet Union. Jews from that province were named "*Litvaken*" (Yiddish for Lithuanians).

As a result, a process of political and ideological polarisation began in Israeli society in the 1970s. Whereas the secular public was largely turning left and adopting liberal, democratic and individualist values, the religious public was generally moving to the right towards nationalistic, collectivistic values and religious conservatism with a focus on the settlement of the Land of Israel (Sabar & Mathias, 2003).[7] It is important to note that the meeting point between secular and religious Jews is asymmetrical. The religious Jew, based on a faith view, would like the secular Jew to become religious; while the secular Jew, based on individualism and adopting a liberal and pluralist view, is not concerned how the other lives, as long as it will not impact on his/her secular lifestyle ("live and let live"). Moreover, the dialogue (or rather the two monologues) between the religious Jew and the secular Jew tends to privilege the religious Jew who brings with him/her a closed argument; the secular debater brings with him/her uncertain, unclear Jewish identification (Shamai, 2000; Tsavan, 1999). It is perceived that this absence of a core in the secular Jewish identity has resulted in a counter process in Israel by which secular Jews have turned back to the sources in order to develop a valued secular culture based on Jewish thought, which is not necessarily in the realm of the sacred (Sheleg, 2000; Bekerman & Silverman, 1997).

This political and ideological polarisation was the backdrop to the rise of a fundamentalist-type group within the faction of religious Zionism – *Gush Emunim* (literally, the Bloc of the Faithful) – that changed the face of Israeli politics forever.

Gush Emunim is a minority group even among the religious. Its members live in the settlements that they have established in the West Bank, the Gaza strip and the Golan Heights after the 1973 Yom Kippur War. Recruitment pools for the movement include the religious youth movement *Bnei Akiva*, the religious education system, their network of seminars and learning centres, new immigrants and middle class Israelis with a strong political commitment to an expansive version of Zionism (Lustick, 2003). Their recruits are mostly young, educated and often prosperous people.

Gush Emunim adherents do not reject Zionism, but rather seek to replace the prevailing secular Zionist discourse with a new, religiously grounded messianic Zionist discourse (Sprinzak, 1993). According to them, the Holocaust was an example of God's discipline. On the other hand, the establishment of Israel (1948), the Six Day War (1967) and the Yom Kippur War (1973) showed that God speaks to Israel not only through

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[7] Note that in Israel the political "right" and "left" is not always synonymous with the religious "right" and "left".

disaster but also through deliverance. Secular Zionism was perceived as a necessary stage in the redemptive process, but its role was completed with the establishment of the State of Israel. The Six Day War – by which Israel came into possession of the Temple Mount in Jerusalem and other core areas of the biblical Land of Israel – awakened in many Jewish hearts the belief that the process of Redemption had begun. The 1973 war, by which Israel was almost defeated by Egypt and Syria on Yom Kippur – the holiest day in the Jewish calendar – was, according to these extremists, a sign from God that the abandonment of the occupied territories will postpone the redemptive process (Lustick, 1993). *Gush Emunim* lost much support after the murder of Yitzhak Rabin, but its members believe that they are the real Jews and the real Zionists (Segev, 2001). Dieckhoff (2003) maintains that the radicalisation of *Gush Emunim* encouraged an opposite trend to the left and gave greater support to the prospect of a Palestinian state adjoining Israel as the best way to keep Israel Zionist. By the 1990s the State of Israel had become polarised between those Jews who prefer to see Israel as a democratic/pluralist nation like any other modern nation, and those who prefer to see Israel as an exclusive Jewish State (The Jewish Agency for Israel, 2003).

The *Ba'alei Teshuva* (literally, "those who return") is another group of religious extremists that was established in Israel after the Six Day War (1967). This was an outreach movement that originated to accommodate new immigrants from the United States who perceived the victory as a miracle that aroused their religious feelings. Some of these immigrants were looking for religious Jewish identity and some were "social misfits" looking for any type of spirituality – a prevalent phenomenon in the America of the "sixties". It was then that some rabbis established the *Ohr Sameach* Yeshiva (religious study centre) and the *Eish Hatorah* Yeshiva in the Old City of Jerusalem to accommodate the needs of these "returnees". These centres still attract many American Jews and substantial funds. After the heavy losses and the trauma of the Yom Kippur War (1973), many Israelis were questioning their own identity. The Zionist agenda was in decline after it was perceived to have achieved its goal of establishing a Jewish state; the Diaspora experience and anti-Semitism were unfamiliar concepts to Israelis. The Israeli-born youth preferred to see themselves as belonging to a nation (Israelis) rather than to a religion (Jews). Moreover, the Israeli army of defence became an army of occupation. The *Ba'alei Teshuva* movements – after the success they had had at converting the American youth in crisis to "authentic" Judaism – were ready to absorb traumatised Israelis and to provide them with "right" and "certain" answers (Sheleg, 2000). *Ohr Sameach* and *Eish Hatorah* later established learning centres throughout the country and outside Israel, including in

South Africa, and aggressively recruited disciples to their *charedi* lifestyle. They therefore became a significant force in the restructuring of the Jewish community schools in Johannesburg – the focus of my inquiry.

Most research on Jewish extremism focuses on Israeli society and culture, but it is assumed that such research is indicative of the Jewish world as a whole (Silberstein, 1993). In contemporary Israel, 78% of the citizens are Jewish ethnically but not religiously.[8] However, Judaism is a way of life for most Israelis who feel a certain nostalgia and respect for the traditional Jewish way of life. It seems that the *charedi* groups depend on this inherent respect for Judaism in their attempt to transform it into active support (Marty and Appleby, 1992). Yet, the *charedim* have many opponents in Israel who perceive them as a tragic aberration of Judaism, far removed from the understanding of the Jewish religion and culture as based on liberal and universal values, such as tolerance and respect for diversity and individuality.

It is observed that conversion to extremism usually results in a personality change, involving the discouragement of critical thinking and the requirement of absolute obedience to group norms. It seems that many new recruits leave their jobs and break with their former social and family ties (Harris, 1999). Furthermore, research has indicated that *Ba'alei Teshuva* tend to be more punctilious in their religious observance than those who have been Orthodox from birth because, having passed from one world to another, they remain continuously aware of the fragile nature of their new lifestyle and are constantly fearing the danger of returning to old habits. In order to eliminate any temptation *Ba'alei Teshuva* prefer to withdraw completely from the surrounding society (Crome, 1993). Crome further maintains that many *Ba'alei Teshuva* take an active part in outreach activities and try to convince others to join, and that they do so partly to convince themselves of the rightness of their views.

Scholars maintain that the phenomenon of *Ba'alei Teshuva* is not only a consequence of social crisis, but is usually motivated by personal crisis in one's secular life (Sheleg, 2000). Sacks (1991), who speaks from an Orthodox Judaism point of view, explains that the *Ba'alei Teshuva* movement is a result of the failure of the secular culture to provide the necessary grounding for human happiness, and for its inability to shape personal identity. He refers to what Emile Durkheim termed *anomie* – the feeling of rootlessness as individuals lose their place in a secure, traditional order. A reaction to that

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[8] It is difficult to define who is religious and who is not. Sheleg (2000) based this statistic on the indicator that a religious male is the one who lays *Tefilin* every day and wears a *Yarmulke* permanently.

leads to an intensive search for ethnic or religious roots and to the revival of identities that seem to have been lost in modern society's melting pot. Sacks believes that the Jewish tradition is benefiting from what is known as Hansen's law – *'that the third immigrant generation labours to remember what the second generation laboured to forget'* (1991:5).

The current turn to religion is not only a Jewish phenomenon. Similar processes can be found among Muslims and Christians (Marty and Appleby, 1992). Sacks (2003) sees the turn towards religion as an indirect consequence of globalisation and the "crisis of identity". For him, religion has become humanity's reaction to the uncertainties induced by the new global economy. Sennett (1998) makes an anecdotal connection between the global economy and religious extremism by describing a process that shifted certain individuals towards the extreme right. In his book *The Corrosion of Character*, Sennett follows a group of former IBM programmers in the United States who were retrenched owing to downsizing and restructuring of the company and were trying to make sense of their experiences. Sennett identifies three stages in the programmers' path to recovery. In the first stage the men believed they were the passive victims of the corporation, betrayed by their company. In the second stage they focused on finding external forces to blame. Sennet suggests that the new Jewish president of the company and the Indian peers who were willing to work for less, aroused their resentment of the "others". This propelled some of them to vote for extreme right wing candidates in the 1994 United States elections; candidates whom they would have found absurd in more secure times. In the third stage, the men restored some of their sense of integrity by speaking about what they could and should have done earlier in their careers in order to prevent their present plight. However, the focus on themselves changed their attitude towards the community. The men subsequently lost interest in civic affairs and dropped out of offices they had previously held in the community, such as school board members or town aldermen. At the same time the men pursued their membership in local churches with even greater vigour. They seemed to have benefited from personal contact with the other church members, especially in the fundamentalist and evangelical forms of Christianity that had been sharply on the rise in their part of the country. Sennett concludes this story by remarking that the men's ethical act of taking responsibility for their life histories in the wake of globalisation had a high price, as it led them to turn inwards and towards fundamentalism.

The term fundamentalism is frequently invoked as people search for analogies to explain subgroups within the Jewish religion, such as the *charedi* or the *Gush Emunim* movements, even though this term has Protestant origins (De Ruyter, 2001). There is,

however, no agreement among scholars as to who fundamentalists are and how to identify them (Marty and Appleby, 1992). Some Jewish scholars tend not to use the term, instead refering to these groups as extremists or *charedim*. Most rabbis, likewise, are reluctant to use the term. Jonathan Sacks, the Chief Rabbi of England, puts it this way:

> Of this I am sure: that every Jew, from *Neturei Karta*[9] to the most Reform, is convinced that he or she is a centrist Jew. Wherever a Jew stands in the spectrum of commitment, those to the right of him are the fundamentalists and those to the left of him are the assimilators. By a miracle of cognitive geometry, the midway point between fanaticism and unacceptable compromise always coincides exactly with wherever the individual happens to stand. 'There are' he or she says, 'so few sane Jews left' (1991:143).

My study will use the terms "*charedi*", "religious extremism", "Ultra Orthodox" and "fundamentalism" interchangeably. Regardless of the terminology, I maintain that these groups possess certain characteristics that separate them from modern Orthodoxy. According to Marty and Appleby (1992) and Silberstein (1993), when we speak about the fundamentalist-type groups, we speak about religious groups that usually have the following shared characteristics:[10]

- Fundamentalists reject modern values, such as human rationalism and Western morals, but they enjoy many of its products, such as transportation, telecommunications, electricity and medical science. This kind of attitude sets fundamentalists apart from other religious groups who try to ward off modernism by wrapping themselves in a religious and cultural cocoon, such as the Amish and certain subgroups within the *charedi* movement.

- Fundamentalists aim to redefine the future and to convert others to their worldview. Lustick (1993) therefore identifies fundamentalism as a political force dedicated towards the rapid and comprehensive transformation of society.

- Fundamentalism is seen as a strategy by which beleaguered believers attempt to preserve their distinctive identity as a people or a group. It emerges in response to a crisis that is perceived to threaten this identity; mostly a crisis in the credibility of the faith for the fundamentalists themselves. It is perceived that in the attempt to strengthen their own faith, fundamentalists transform it to something completely different (Hunter, 1993).

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[9] Extreme *charedi* group that resides in Mea Shearim, Jerusalem.
[10] These characteristics are useful as conceptual tools to identify elements of fundamentalism within the different religious groups, rather than as defining features. They should be regarded with caution in the Jewish context.

- Fundamentalist movements rely on charismatic and authoritarian leadership. The fundamentals are taught with great authority; by adhering obediently to them, believers will be able to resist the seductions of the secular world. Fundamentalists believe in personal leadership as opposed to a belief in pluralism and democracy. *'There is only one version of the truth, one leader, one book, one way – no doubt or self criticism, no development, no change'* (Lazarus-Yafeh, 1993:51). Fundamentalist leaders demand respect and unquestioning obedience (De Ruyter, 2001)

- Fundamentalists resist relativism – the notion that no belief is absolutely true – and pluralism – the support for different expressions of belief. They want people to declare themselves and to commit themselves to a particular interpretation of the religion.

- Fundamentalists tend to see history as part of a cosmic pattern. History is the unfolding of the redemption process; it is God's way of communicating with the world.

- Fundamentalists build effective communities, thereby providing a solution to the extreme individualism and uncertainties of modern times. For liberals, these are the "bad" communities where members are drawn together as a result of strong religious authority or manipulation of the quest for identity and emotional support. Nevertheless, these are strong communities with defined borders and a code of behaviour that protects members from contamination by outsiders.

- Fundamentalists see themselves struggling against the "others". These include secular nationalists or the established authority of their own religious community, which they believe has been compromised by non-believers. Fundamentalists also share contempt for all outsiders or "others" (Lazarus-Yafeh, 1993). The source of this contempt is the fundamentalist's feeling of superiority since his/her source of knowledge is based on divine sanction (De Ruyter, 2001; Davis, 2000).

I have argued so far that the hegemony of the Zionist ideology which shaped the Jewish discourse from the end of the 19th century, began to decline towards the end of the 20th century. With its decline, secular Judaism – which is based on secular Zionism – lost its core and thus the glue that holds it together. At the same time, the emergence of Jewish fundamentalist-type groups – either those based on religious Zionism or those based on the Ultra Orthodoxy's rejection of Zionism – have shifted power relations in the Jewish world and have attempted to redefine the meaning of being Jewish. The question is how the Judaism(s)–Zionism debate has impacted on the Jewish community in South Africa. It has

been argued in Chapter 2 that the local interpretation of global processes depends on the community's/institution's history and context. Consequently, every Jewish centre would respond to these processes in a different way. The unique South African context and its interpretation of the global processes is explored in the next section.

The local context – The Jewish community in South Africa

The South African Jewish community was first established when a large number of British settlers arrived in the country in 1820. Another large influx of East European immigrants, the majority from Lithuania, arrived between 1880–1940.[11] Some immigrants arrived in the 1970s, mostly from Israel and from Southern African countries including Zimbabwe, Zambia and Namibia. At its peak, in the 1970s, the Jewish population in South Africa was estimated at 118,000 and was spread throughout the country. Emigration from South Africa began in the mid-1970s as a result of political uncertainties and continues to this day. The most popular destinations for immigration are Australia (40%); the United States (20%); Israel (15%); and the United Kingdom and Canada (10%). The current Jewish population in South Africa (2003) is estimated at 80,000–85,000, concentrated mainly in Johannesburg (55,000) and Cape Town (18,000) (Saks, 2003). It is considered to be an aging community due to the emigration of mostly young people (DellaPergola & Dubb, 1988).

A 1998 attitudinal survey[12] showed a very well educated community by South African standards. Most held professional and managerial positions. Only about two percent of the sample was employed in manual and unskilled jobs.

The community prides itself on its low assimilation rate[13] and its well-organised community organisations (Kopelowitz, 1997/8; Aschheim, 1970). These include the following:

The South African Jewish Board of Deputies (SAJBD) – established in 1903. The SAJBD is the representative body of the community. It acts as the authorised spokesman for the Jewish community in its relations with the government and other ethnic and religious groups, and is mandated to watch over the welfare of the community and to monitor anti-Semitism.

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[11] The Quota Bill of 1930 and the Alien Act of 1937 restricted Jewish immigration from Eastern Europe and later on from Germany (Shain, 2000).

[12] JPR Report (September 1999). *Jews of the New South Africa: Highlights of the 1998 national survey of South African Jews.* Institute for Jewish Policy Research in association with the Kaplan Centre, Report No.3.

[13] Below 10% in 1998 survey, ibid.

The South African Zionist Federation (SAZF) – established in 1898. The SAZF's role is to promote Zionism and to maintain strong links with Israel.

Other organisations include the South African Board of Jewish Education (SABJE); the Federation of Synagogues of South Africa (Orthodox); the Union for Progressive Judaism; the Israel United Appeal and the United Communal Funds (IUA/UCF) – a fund-raising arm of the community that distributes funds to Israel, to the local community and to other Jewish communities around the world; the Union of Jewish Women of South Africa; Jewish Helping Hand and Burial Society (*Chevre Kadisha*); Jewish Communal Services; *Nechama*[14] for the bereaved; Our Parents' Home, and many others. Other organisations such as ORT and *Tikkun*[15] aid the disadvantaged in the broader community.

The imagined community

The Jewish community in Johannesburg is frequently described as a cohesive Zionist community, whose religious affiliation is based on the *Mitnagdim* Orthodox tradition, owing to its overwhelming Lithuanian origins. This prevalent description has silenced most other voices in the community, past and present, such as the voice of the Yiddish-speaking socialist members of the *Bund* who either joined the Communist Party or gave in to the dominant Zionist discourse (Sherman, 2000); the voice of Reform Judaism that tried to modernise *Hallacha*; and the voice of the radicals, sometime atheists, who fought against apartheid and were ostracised by the community.[16]

I will argue that while South African Jewry in the main is still adhering to the traditional narrative of a *Mitnagdim*/Orthodox/Zionist/cohesive community, the meanings of these terms have changed over the years. The objective of the following section is therefore to explore the development of this narrative and to discuss its three ingredients, namely: the community ethnic cohesiveness based on the centrality of the Zionist discourse; the nature of its religiosity; and its elevation of the notion of homogeneity.

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[14] Literally mean consolation.

[15] The name *Tikkun* is derived from the religious concept of "*Tikkun Olam*" – mending the world. The organisation was initiated in 1998 by Chief Rabbi Harris and Jewish philanthropists.

[16] There have been recent attempts to give voice to these radicals, see Suttner, 1997; Shain & Mendelsohn, 2000.

Zionism as ethnic identification

The ethnic cohesiveness of the vast majority of Lithuanian Jews was originally centred on Zionism (Shimoni, 1999a). This ethnicity was further promoted in South Africa for the following reasons:

First, the structure of the South African society as a whole, with its segmentation into racial and ethnic groups, encouraged Jews to revitalise their own cultural and ethnic identity, including Zionism as a prominent component thereof (Steinberg, 1989). Thus while in Westernised countries, such as the United States and the United Kingdom, Jews avoided joining a Zionist movement for fear of "dual loyalty" allegations, in South Africa the loyalty to one *volk* was not only acceptable, but praiseworthy (Campbell, 2000).

Second, the foundations of the Zionist movement in South Africa were laid in 1898, before any other ideology could develop. Consequently, it became the first *de facto* representative institution of the community and hence the most powerful one: *'to be a good Jew in South Africa meant to be a good Zionist'* (Shimoni, 1980:30). The hegemony of the Zionist movement was such that it even coordinated organisations that in other Westernised societies would have functioned as separate bodies, such as the orthodox religious *Mizrachi* movement.

Third, it is suggested that the later arrival of the Reform movement to South Africa contributed to the dominance of the Zionist discourse because Zionism gave the Jewish community an accepted secular alternative to the Orthodox tradition (Simon, 1995).

Fourth, Aschheim (1970) offers an "insurance policy" theory to explain the Zionist hegemony in South Africa. According to this theory, Zionism is a function of the insecurities of living in a potentially anti-Semitic and explosive multiracial society. Zion therefore became a "reserve homeland" for the threatened Jews of South Africa.

The Zionism of the South African Jewish community has its own characteristics. Shimoni (1980) maintains that this Zionist identification did not include a strong personal commitment to settle in Israel – referred to as *Aliyah* (literally, to "ascend" to the land of Israel) – especially because the Jews in South Africa were confident in the continued viability of their Jewish life-style in South Africa. They therefore identified with the notion of "returning to Zion" without regarding it as directly applicable to themselves. *Aliyah* became a significant factor in South African Zionism after the Second World War, but even then it remained modest in scale and mostly corresponded to the political turmoil in South

Africa.[17] Zionist activity's focused mainly on raising funds and supporting the establishment of the Jewish State. Most significantly, the Zionist youth movement, *Habonim*, had a profound effect on the Jewish identity of the South African-born generation, which resulted in the development of Jewish identification determined by Zionism for the second generation of Jewish youth.

The relationship between the State of Israel and South Africa has vacillated through different phases since 1948, which also impacted on the Zionist inclination of the Jewish community.[18] Afrikaners – in spite of strong anti-Semitic attitudes during the first half of the 20th century and their pro-Nazi sentiments (Shain, 2000) – were sympathetic to Zionism and to the Jewish State, based on their Calvinistic genuflection to the Old Testament. The South African government, under Malan and his successors, allowed the Jewish community to support the State of Israel without the fear of being accused of dual loyalty. However, in 1961, Jewish community leaders were concerned when Israel sided with African countries in condemning South Africa's racially discriminatory policies. But in the 1970s, Israel and South Africa – both politically isolated – improved their trade and diplomatic relations, including the selling of weapons. This generated new tensions in the Jewish community, which by then mostly identified itself with the progressive movement and with the government's *verligte* (enlightened) reform (Shimoni, 1988). In 1987 Israel joined the sanctions imposed by European Common Market countries against South Africa while the Jewish community, like many other white South African communities, supported the lifting of sanctions. The post-apartheid South African government has supported Palestinian national aspirations, while retaining reasonable relations with Israel. However, it has not been uncommon for African National Congress (ANC) leaders to express pro-Palestinian and anti-Israeli sentiments.[19] The ANC leaders – who naturally focus on the dispossessed and the disadvantaged – maintain close ties with the Palestinian Liberation Organisation (PLO) leaders and other Arab countries that were hospitable to them during the apartheid era. It is perceived that the Jewish community is paying the price for the contradictory messages delivered by the Israeli diplomacy towards South Africa.[20]

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[17] Larger numbers of immigrants to Israel were registered after the Sharpeville (1960) and Soweto (1976) riots, indicating that South African Jews tend to go to Israel when they feel under threat. Source: Align Statistics – http://www.jewish.org.za/php/3/community.php3?action=present.

[18] For a detailed accounts on the relationship between Israel and South Africa and its impact on the Jewish community see Shimoni, 2003 and Goldberg, 2002.

[19] SA Jews dismayed over Mbeki's pro-Palestinian stance. *SA Jewish Report*, 17–24 November 2000.

[20] Banners, Beatings and Boycotts. *The Jerusalem Report*, online, 12 February 2002.

Zionist hegemony began its decline in the 1970s partially as a result of the embarrassment felt by many South African Jews over the diplomatic and trade relations that existed between the State of Israel and apartheid South Africa. This mostly affected the more liberal-minded young Jews who had become disenchanted with Israel's foreign policies, and by extension with Zionism. At the same time, the Zionist institutional structures were declining. There was an increasing lack of interest in their activities and the South African Jews that left the country seemed to prefer to go to Australia or Canada, rather than to Israel. The Zionist institutions became demoralised, realising that they had failed the test of time. Moreover, the fact that a significant number of Israeli-born Jews left Israel and immigrated to South Africa compounded this disillusionment (ibid).

The immigration of Israeli-born Jews to South Africa began around the 1970s, following the development of trade relationships between the two countries. According to Shimoni (2003) the number of Israelis never exceeded 10,000, but rumours have always exaggerated this figure. By the 1990s, many of these Israelis had left South Africa.

A single study on the topic by Frankental (1999) describes the Israeli experience in Cape Town, which is not dissimilar to the Johannesburg experience. Israelis came to South Africa as individuals. They did not create an "ethnic enclave" in South Africa nor did they establish Israeli institutions. It is perceived that the Israelis were not welcomed as a source of enrichment to a dwindling Jewish community in South Africa, nor were they interested in participating in Jewish community life. According to Frankental, South African Jews perceived Israelis as a subcategory of Jews "other" than themselves, often referred to as "the Israelis". According to her research, Israelis are often perceived in negative stereotypical terms as being loud and pushy, interested only in making a "quick buck", not community minded and caring little about tradition, etc. For the Israelis, South African Jews have also been the "others" mainly because of the difference in traits. For example, Israelis prefer a more informal, honest and straightforward way of interacting with people. Moreover, secular Israelis seem not to have the same respect that South African Jews have for religious institutions, and tend to describe their increased strictness as "religious coercion".

It therefore seems that the hegemony of the Zionist ideology was on the decline in the last two decades of the 20th century. It is perceived that this disillusionment created an ideological void that was filled by religiosity (Shimoni, 2003). The changes in the community's level of religious observance will be explored in the next section.

From "non-observant Orthodoxy" to Ultra Orthodoxy

The religiosity of the vast majority of the community was based on both the Lithuanian *Mitnagdim* Orthodox tradition (that is, opposition to the *Chasidim*) already weakened by secularisation in the Old Country, and on the lax religious expression of the Anglo Jewry who had arrived in South Africa ahead of the Lithuanians. This resulted in a normative mode of religiosity that has been described by the oxymoron "non-observant Orthodoxy" (Hellig, 1984). Non-observant Orthodox Jews respect the *Mitnagdim* tradition even though they do not adhere to its prescriptions. *Shul* (synagogue) attendance and the adherence to specific Jewish rituals provided only a limited measure of religiosity; it was perceived mostly as an occasion for social encounters and for adopting an accepted form of identification. Many Orthodox rabbis came to terms with this phenomenon with the hope that the community would eventually become more observant (Isaacs, 1995). South African Orthodoxy was therefore traditionally perceived more as a form of identification than as a matter of religious observance (Aschheim, 1970).

It seems that religious affiliation was promoted more by family tradition than by any ideological conviction (Rubenstein, 1995). Rubenstein further maintains that the homogeneity of the community resulted in an elevation of communal unity as the supreme ideological value; there is much community pressure for accommodation and civility between religious groupings. This in turn inhibited the flourishing of any creative Jewish thought. Moreover, the Jews in South Africa are uninformed about modern Jewish movements (Hellig, 1984) and have traditionally avoided pursuing serious Jewish studies, hence the paucity of university graduates in Jewish subjects (Harris, 1995).

When Orthodoxy became stricter, most South African Jews were willing to accept the changes without opposition because of the respect they had for this tradition, and probably due to their lack of Jewish knowledge to deliberate and question this shift. The community also perceived the traditional rabbinate as the only rightful source of religious authority. Consequently, the Orthodox rabbinate, in particular the Orthodox Chief Rabbi and the *Beit Din* (the Jewish court), continued to exercise power over a wide range of issues, such as conversion, *kashrut* and synagogue standards.

The Ultra Orthodox and the Reform movements made relatively little headway in the early days of the community.

The Ultra Orthodox was confined to a small splinter group of German immigrants that in the 1930s had established a congregation known as *Adat Yeshuron*, in the Johannesburg suburb of Yeoville. In 1969 a *Kollel* was formed to provide married men

with intensive Torah studies. The name *Kollel* later came to refer to the entire community of Ultra Orthodox Jewish families (Hellig, 1984).

The Reform movement (later known as the Progressive movement) was introduced to South Africa in 1933. From its inception it encountered strong resistance from the Orthodox rabbinate based on the Orthodoxy's conviction that the *Hallacha* cannot be bent (ibid). The only concession ever given to the Reform movement was to allow a Reform Rabbi to sit on the stage alongside other officials at the annual memorial for Holocaust victims, as well as at other non-religious public gatherings (Shimoni, 2003; Saks, 1999). According to a survey in 1974, 77.1% of South African Jewry supported Orthodox synagogues while 16.6% supported Reform temples (Hellig, 1984). Hellig maintains that the Reform movement never developed further in South Africa since the Orthodox establishment allowed for the participation of non-observant Jews who, traditionally, would have been excluded from such synagogues. She further suggests that the broader religious context in South Africa – especially the "state" Reform Church ethic that was puritan and extremely traditional – did not provide a favourable place for the growth of Reform Judaism. Moreover, the rise of Reform Judaism is usually associated with a high level of intermarriage, and South Africa's low assimilation rate negates this necessity.

South African Reform Judaism is a unique phenomenon especially as it was never anti-Zionist and as it adhered to many of the religious rituals; even though Reform Judaism practices the rites of passage differently from the Orthodox. Reform Jews emphasise the equality of all people, regardless of race, sex, creed and financial status, and therefore they adopt the practice of unassigned seats and mixed seating in their temples, in contrast to the separation of men and women at Orthodox synagogues. They are also outward looking and had thus been traditionally involved in philanthropic work for the disadvantaged broader South African community.

From the late 1950s, after the charismatic Reform leader Rabbi Weiler immigrated to Israel, the movement began to decline. It again suffered a series of blows to its morale and membership in the 1980s and 1990s, mostly related to personality issues. Thus, by 1998, there were only ten official Reform congregations in South Africa, three of which were in Johannesburg. It is currently observed that the Reform movement is an aging community that has failed to attract younger members. According to a 1998 national survey, eight percent of Jews in the Johannesburg area still belong to the Reform movement, which seems to have more burial than marriage ceremonies (Saks, 1999).

The relationship between the Reform and the Orthodox communities has remained tense. Disputes have flared up from time to time but have seemingly diminished over the past few years *'with the Orthodox feeling less threatened and the Reform being less militant'* (ibid:72). Recent events, however, point to underlying tensions. In Cape Town, religious leaders avoided attending the 2000 Holocaust Day memorial ceremony as a Reform Rabbi was to be the guest speaker.[21] During that same year, the *SA Jewish Report*, under pressure from the Chief Rabbi, stopped running a weekly column by a journalist who was a member of the Reform movement, because of his harsh criticism of mainstream Orthodoxy and its leaders.[22] The *SA Jewish Report*'s board of directors made it clear that one could only debate Judaism within the discourse of Orthodoxy; and that for the preservation of the unity of the community, different views should not be voiced:

> Allowing for difference of opinion is one thing, but it was never the intention of those who founded the newspaper to provide a platform for regularly attacking Orthodox Jews and Orthodox Judaism. Such a paper, apart from becoming a divisive element, rather than the unifying force it was intended to be, would inevitably be rejected by the mainstream community.[23]

In the 1960s and 1970s – as the more enlightened outward-looking rabbis left South Africa owing to their conviction that to continue living in apartheid South Africa was against their conscience (Shimoni, 2003), and with the resurgence of *Ba'alei Teshuva* movements in the Jewish world – a large number of strictly Orthodox, yeshiva-trained rabbis from overseas arrived in South Africa. It was perceived that most of these rabbis, based on their Ultra Orthodox and non-secular education, tended to be inward-looking and insular. They tended to be concerned only with increased Jewish observance and were detached from any sense of responsibility to the community or wider society. The new rabbis slowly transformed a significant minority of the community through their educational systems, their charisma and their dedication to religious transformation. Some of these rabbis filled positions at a number of mainstream (*Mitnagdim*) synagogues.

The first to arrive were the *Chassidic* Jews. The Lubavitch foundation movement was established in South Africa in 1972 under the control of *Rebbe* Menachem Mendel Schneerson, from his stronghold in Crown Heigths, Brooklyn, New York.[24] The view of

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[21] *SA Jewish Report*, 8 June 2000.
[22] Steven Freedman is arrogant and ill-informed. *SA Jewish Report*, 1–8 September 2000; See also Letters to the Editors. *SA Jewish Report*, 6–13 October 2000.
[23] Paper must reflect Orthodox reality. *SA Jewish Report,* 6–13 October 2000.
[24] The *Rebbe* was laid to rest in June 1994 and is expected to return soon to complete the redemption in his capacity as the messiah (Berger, 2001).

the Lubavitchers is that Judaism involves the totality of the individual. They implemented an effective outreach programme, which attempted to spread the message of *ahavat Israel* – the love of all Jews. Hellig (1984) observes that one of the successes of the Lubavitch movement is its mastery of public relations and the media; a strategy used by many fundamentalist-type groups. They use colourful pamphlets to encourage the performance of *mitzvot* (commandments) and offer many facilities free of charge. They use Yiddish as a medium of communication, they visit the sick regularly and work tirelessly to reach out to all Jews in the community.

In 1986, the Ultra Orthodox *Ba'alei Teshuva* movement – *Ohr Sameach* – established branches in Johannesburg predominantly in the suburb of Glenhazel. *Ohr Sameach* initially catered to young adults by creating a learning centre that encouraged meetings three times a week, held at first in the home of one of the rabbis. The group quickly outgrew the space, its popularity stemming from its ability to establish a trend by which it became not only acceptable but socially advantageous to attend *shiurim* (literally, "lessons") (Kaplan, 1998b). These lectures were delivered by guest speakers from abroad and usually focused on the immediate emotional concerns of the audience, in particular, on psychological issues such as interpersonal skills, relationships, and how to deal with the stresses of modern life.

Ohr Sameach tried to avoid conflicts with various subgroups within the Orthodox community. Yet at the same time it attempted to appeal to as broad a spectrum of Orthodox people as possible. In the 1990s, the organisation established more branches in different suburbs, creating tight religious communities that have become highly influential elements in Johannesburg Jewish life. Furthermore, in 1996 *Aish Hatorah* opened its own branch in Johannesburg, providing more outreach programmes to the community.

The development of the *Ba'alei Teshuva* movement in Johannesburg is connected to a related phenomenon: the growth of the *shtibl* – the small, traditional house of prayer associated with the Eastern European Jews – as an alternative to the large, formal synagogues, which was typical of the British Commonwealth style. Consequently, the big synagogues and the Anglo-Lithuanian tradition were challenged by the proliferations of these small *shtibl*-type congregations. Bernhard, an Orthodox rabbi with strong affiliations to the Lubavitch movement, explains that the advantage of the *shtibl* over the aesthetically pleasing, organised, larger synagogues is their community value: *'Being a smaller congregation, it imparts a greater sensation of belonging than the "Big Shul". There is a distinctive awareness of the individual significance of each person. There is a sense of*

camaraderie, warmth and fellow-feeling' (Bernhard, 1995:79). While in the main the Orthodox establishment welcomed the turn towards religiosity, it objected to the balkanisation of the community, the loss of central control, and the tendency for these *shtibls* to become independent, separatist institutions (Harris, 1999). There was also the possibility of a lack of standards and the danger that they would provide an opportunity for a breakaway from the religious establishment for those members who are contemptuous of it and feel no responsibility towards the larger Jewish community (Bernhard, 1995).

In 1995, Rabbi Bernhard declared that *'virtually every family has been touched by the resurgence of Yidishkayt [the culture that goes with the Yiddish] in South Africa. Everyone knows somebody who is frum [religious]'* (ibid:77). Shimoni (2003) maintains that this move towards greater religiosity should not be exaggerated and that most South African Jews may still be characterised as "non-observant Orthodox". However, the lack of clear consensus and standards by which to measure religiosity, means that both arguments are located in the realm of perception.

The success of the *Ba'alei Teshuva* movement in South Africa is attributed to four main factors:

First, the affinity that the community has to Orthodoxy. Most South African-born Jews have been raised in homes in which there was more sympathy for Orthodoxy than knowledge of it. Thus they were natural candidates for a more intense version of Orthodox Jewish belief and practice (Adar, 1965). Moreover, the Zionist ideology is based on the Jewish tradition; Zionism therefore never rejected Judaism. By and large even non-observant Jews began to conform to the stricter orthodox standards, especially those concerned with various rites of passage and *kashrut*. Shimoni (2003) maintains that this did not take the appearance of a religious "cult" but rather became the norm for the community as a whole. It is perceived that South African parents – even those who practice virtually no Jewish law – accept their children's greater involvement in and allegiance to Orthodoxy (Kaplan, 1998b; Roer-Strier & Sands, 2001).

Second, it is hypothesised that the rapid transformation and the insecurities created by social changes in South Africa after 1994, as well as the increased level of crime, pushed more Jews to escape into the warmth of communal seclusion provided by the religious institutions. They seem to seek the *'spiritual solace and orderly life that comes with submission to the authority of rabbinical mentors and immersion in the all encompassing orthodox code of living'* (Shimoni, 2003:234).

Third, the increase in the level of religious observance in the community went hand in hand with the decrease of the Zionist hegemony, a process discussed earlier in this chapter.

Fourth, while the Ultra Orthodox educational programmes became trendy and popular, alternative scholarly programmes stressing liberal values drew an extremely limited audience. Some researchers tried to explain this phenomenon by looking at the historical and cultural background of the Jewish community. It is perceived that Jewish identity in South Africa was based *'on spontaneous sentiment rather than a deep involvement in religious practice or culture and learning'* (Steinberg, 1989:363). Consequently, it is viewed that the charisma of the speakers, rather than intellectual argumentation, could have had an impact on the community (Kaplan, 1998a). Furthermore, it is perceived that living and being educated under the apartheid regime has trained South African society not to engage in critical thinking processes and to avoid asking too many questions (ibid). Kaplan observes that the creation of an open, democratic order has not changed this mentality but rather initiated a trend among many Jews (and other white groups) to withdraw from general society and to form tighter close-knit subunits. This trend has manifested in the increasing social ghettosation around *shtibls*.

The narrative has so far demonstrated that while Jewish ethnicity based on Zionism was a relatively unifying factor, the perceived unity of the community begun to disperse with the decline of Zionist ideals and organisations and the proliferation of religious activity, coupled with the underlying rivalry between the various splinter groups (Hellig, 1984). Already in the late 1980s there was a clash between those who favoured the continuation of appointing the Chief Rabbi from the *Mitnagdim* tradition and those who wanted a *Rebbe*, who practiced *Chassidism*. The clash was in essence a struggle for control of the community (Kaplan, 1991). Consequently, Kaplan believes that *'the appointment of Chief Rabbi Harris [was] an overwhelming victory for the determination of the majority of the Johannesburg Jewry to maintain the tradition observed from its earlier years'* (1991:252). The appointment of Chief Rabbi Harris, however, has not reversed the transformation of the community towards a more insular, inward-looking and polarised community.

A homogenous community

The third factor that has shaped the character of the Jewish community in South Africa has been its profound pressure to conform (Aschheim, 1970), its inclination to avoid

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controversy in the interest of maintaining Jewish unity, and the avoidance of any debate on issues that might come to give Jews a bad name in the eyes of the gentile majority.[25]

The pressure for conformity has been reflected in the official Jewish attitudes towards the National Party and towards those individuals who resisted the apartheid regime.

Most South African Jews came from an environment of oppression in Lithuania and stepped into a society in which their "white" skin colour instantly and automatically made them part of the white minority that ruled over the black majority. Jews accepted these privileges with "both hands" and established themselves in industry, commerce, mining and the professions, fitting well into a comfortable middle class position. The victory of the Afrikaner Nationalists in the 1948 elections was first seen as a threat to the community, based on the Nationalists' inclusion of some Nazi supporters in their ranks, and their record of anti-Semitism, which restricted Jewish immigration in the 1930s and barred Jews from membership in the party's leading Transvaal province (Shimoni, 2003; Shain, 2000). As it turned out the National Party did not adopt an anti-Semitic policy, instead forging a relatively cordial relationship with the Jewish community; albeit with isolated, threatening warnings from government leaders, either out of anger at the anti-apartheid actions of individual Jews, or because of the Israeli vote against South Africa in the United Nations in 1961.[26]

The Jewish community found itself in a dilemma of conscience: should it be loyal to the country that gave them safe haven and prosperity; or should it oppose a system of government that oppressed other people, especially in view of the Jewish history of persecution? The compromise reached by the South African Jewish Board of Deputies – the official body representing the Jewish community – was that Jews as citizens could behave according to their conscience, but that the Board itself would not become involved in the politics of the country (Goldberg, 2002). Shimoni (2003) maintains that deep-seated fears underlay this compromise and that the Jews as a community felt themselves to be hostage to Afrikaner nationalist goodwill. He argues that in this sense the Board of Deputies acted for the benefit of the community whose welfare depended on conformity with the white consensus, and that its actions were *characteristic of minority group behaviour – a phenomenon of self-preservation, performed at the cost of moral*

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[25] Exploration of being Jewish in South Africa. *SA Jewish Report*, 31 January–7 February 2003.

[26] Benjamin Pogrund, A deafening silence, unconscionable or excusable? A look at the actions of the Jewish community in South Africa through the darkest period of apartheid rule. *Ha'aretz* [online] 26 December 2003.

righteousness' (Shimoni, 2003:276).[27] Others argue that Jewish leadership ran scared and that their fears were exaggerated.[28]

The point that I would like to make is concerned with the attitude of the Jewish leadership towards those Jews who stood by their moral conscience and struggled against the apartheid regime. While the vast majority of Jews complied with apartheid (like the rest of the white population) and benefited from it, many white radicals and liberals were Jews (Asmal et al, 2003; Mandela, 1994). The message of the community leaders to those individuals was that they were endangering the community by their anti-government acts. The Board of Deputies and the majority of the community consequently disassociated themselves from these activists, ignored and ostracised them. To be fair, these activists did reject most of the values that the community held dear, and they did not fit into the dominant narrative. They were mostly secular Jews or atheists, socialist, anti-capitalist or anti-Zionist.[29] Subsequently they were often considered as "non-Jewish Jews" who cared for the blacks but not for their own community (Suttner, 1997). It is evident that the establishment did not support liberal thinkers who would not "toe the line" and did not conform to the majority; a practice that, as I will illustrate later, had an impact on the restructuring process.

The case of Claudia Braude demonstrates that the silencing of non-conformists in the community is continuing even after the South African transformation. In 1997 Braude wrote an article criticising the behaviour of Jewish leaders under apartheid. She mentioned in particular Dr Percy Yutar, who was the prosecutor at the trial in which Nelson Mandela was sentenced to life imprisonment, while at the same time being elected head of the United Hebrew Congregation, Johannesburg's group of Orthodox synagogues. The article was not allowed to be published in *Jewish Affairs*, even though Braude herself was on the editorial board of the magazine. She resigned as a result and proceeded to publish her views in the general press; an action that was highly criticised. For Campbell (2000) this is another example of the Board of Deputies' refusal to allow confrontation and open debate even in post-apartheid times. Shimoni, on the other hand, ends the discussion on Braude

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[27] In this context it is important to note that Shimoni's book (2003) was commissioned by the SA Jewish Board of Deputies.
[28] Mervyn Smith's presentation at the conference of the Jewish Board of Deputies, Johannesburg, 7 September 2003.
[29] Ibid.

with a patronising statement reflecting the view of those members of the community he claims to have observed at a public meeting:[30]

> In the eyes of the other Jews who were not inclined to be so judgemental, Braude's views, however well intentioned, appeared to be no more than the self righteous harangue of a post apartheid youngster insufficiently mature to appreciate the universal phenomenon of minority group behaviour (Shimoni, 2003:268).

The case of Braude demonstrates that debate could only take place within the defined boundaries of the mainstream community. Braude's case became known simply because she defied the establishment and did not agree to be silenced. For this she was harshly condemned.

It seems that the Jewish community's highest value has been its unity and conformity, which resulted in intolerant behaviour towards those with different or liberal ideas. This was not confined only to the political arena, in which such behaviour may be excused based on never-ending fears of anti-Semitism. As already illustrated in the tension between Reform and Orthodox, the same approach has been used to censor any divergent views within Judaism. It seems that open debate or criticism of the establishment have been curtailed in order not to "divide the community". By silencing dissenting voices the "imagined" cohesiveness of the community has been preserved.

This chapter has so far described the international, ideological and local contexts within which changes in Jewish education can be explained and understood. It demonstrates that the strong Jewish identity with its focus on Zionism, had been shaped by the mostly Lithuanian origins of the community and reinforced by the ideology of apartheid. The latter promoted ethnic and cultural differences, thereby legitimising Jewish separateness. The transition in South Africa set forces in motion that have progressively eroded the unique social structure that had been so successful in artificially maintaining this Jewish identity. At the same time the political and ideological struggles in Israel, which have polarised the Jewish world, further destabilised the Jewish identity of many South African Jews. The dominant discourse of an Orthodox/*Mitnagdim/*Zionist/cohesive community has become infused with different meanings. I doubt whether the *Mitnagdim*/Lithuanian concept is even familiar to many third generation South African born Jews. Expressions of Zionism have become mostly religious rather than secular, and the resurgence of religion has balkanised the community into *shtibls. Chassidic* practices and thoughts have permeated the traditional *Mitnagdim* Orthodoxy without the community

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[30] Shimoni, 2003:317n73.

at large having enough Jewish knowledge to be aware of the differences. Moreover, the narrative demonstrates that the cohesiveness of the "imagined community" has been maintained mostly by ignoring or silencing different voices – either political or ideological. Consequently, the community has not been exposed to debate and different worldviews, and hence to learning and intellectual stimulation. The emigration of many intellectual and liberal thinkers as a response to the apartheid policies aggravated this situation. South Africa's transformation to democracy has not seemed to open up the community to new possibilities, but has instead made it more inward-looking and insular. The pro-Palestinian attitude of the South African government and its close ties with the Arab world have reinforced this isolation.

It appears therefore that by the end of the 20th century – due to both global and local processes – the identity of the Jewish community in Johannesburg shifted from an identity based on ethnicity to that based on religion. This shift has been facilitated by forces pulling towards the establishment of a homogenous community, which in turn reveals tendencies towards exclusiveness and separateness. The official researcher at the South African Jewish Board of Deputies, an Ultra Orthodox Jew, therefore enthusiastically maintains that:

> Despite ongoing attrition through emigration, which has led to the common perception overseas that the community is one in apparently terminal crisis, in many ways South African Jewry is experiencing *a golden age* in terms of Jewish commitment and involvement. These have been raised to levels seldom equalled and certainly not surpassed by any other Diaspora community (Saks, 2003:10). (My emphasis.)

For liberal thinkers such as Dennis Davis,[31] however, this "golden age" means:

> …*the closure of the Jewish mind*, the creation of "other" within Jewish ranks, a hatred of difference and a consequent rejection of any possible reconciliation between Muslim and Jew, Palestinian and Israeli. Of equal importance, this form of Judaism promotes the group at all costs. The individual is then subsumed under the weight of obligations to the group, Judaism then becomes a custom-made product, and the possibility of individual development implodes (Davis, 2000:209). (My emphasis.)

As the identity of the Jewish community has shifted, the community's educational institutions have played an essential role in both creating and maintaining the shift. The objective of the next section is therefore to analyse how Jewish education in South Africa – and in particular the Jewish community schools – has shaped and has been shaped by the changing political and ideological milieu.

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[31] A Professor of Law and a Judge of the High Court in Cape Town.

The education context – the Jewish community schools[32]

The Jewish community schools in South Africa have always been a site of ideological, social and political struggle. The main tension involving the Jewish schools has been their religious/ideological orientation; that is, their position on the Zionist–Judaism debate. Another dilemma has been the schools' position regarding the liberal–community dichotomy – in other words, should the schools encourage pluralism and the notion of "Judaisms" (Kirsch, 2002), or should they perpetuate a single interpretation of Jewish identity? Additional tension has centred around the fundamental issue of faith-based community schools in society; meaning, is it un-democratic and discriminatory to have an exclusive Jewish day school (which is inherently white) and to what extent can a Jewish school become an open school without jeopardising its Jewish ethos? These continue to be core issues that are raised and debated from time to time. Other related tensions have revolved around the funding of the schools and their management. Managing viable community schools is a complex enterprise depending on many factors: some related to the ethos of the schools and their mission, and some related to the economic and political contexts in which the schools operate. The objective of this section, therefore, is to explore these tensions and conflicts and to identify the specific global and local processes to which the schools were reacting. Such an examination, however, cannot begin without a brief chronological overview that follows the development of the South African Board of Jewish Education (the Board) and the growth of the Jewish community schools – the King David (KD) schools.

Historical overview

The Board was established in 1928, on the initiative of the Zionist Federation and the Jewish Board of Deputies.[33] Its main function was to promote and coordinate the fragmented educational provisions that were provided by different institutions all over Southern Africa (including Rhodesia and the Belgian Congo). Jewish education at that time comprised mostly afternoon schooling (*Talmud Torah*) to Jewish children who attended public schools. The objectives of the Board were, *inter alia,* to advise committees and bodies in control of Jewish schools, to secure the adequate inspection of schools, to further

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[32] While most of this section is based on articles, reports, newspapers and various publications of the South African Board of Jewish Education (the Board), it is further supplemented by my inside knowledge as a professional officer of the Board and by my access to documentation and people, subject to ethical consideration.

[33] For a study of Jewish education prior to the establishment of the Board, see Kaplan and Robertson (1991).

the training of teachers in Hebrew and religion, and to encourage the preparation of suitable text books. By 1933 most of the Hebrew schools (about 115 schools) were affiliated to the Board (Mink, 1984).

The first Jewish day school, King David Linksfield Primary (KDLP), was established by the Board in 1948 as a "model day school" in order to guide and encourage other bodies to set up similar institutions in which Jewish learning would take place alongside general (secular) studies. There were two underlying principles for the school: its "broadly national-traditional" framework (more about this later); and its commitment to provide a Jewish education to every child that desired it.

The school was established amid opposition from many communal leaders and organisations, as well as from certain religious quarters (Mink, 1984). Most parents opposed such a venture for different reasons: some felt that Jewish studies were old fashioned and obsolete; other feared that the school would turn their children into rabbis. Some opposed the establishment of the schools on practical grounds, namely, the financial burden that the community would have to bear (Hayman, 1988). Some parents were concerned about ghettoisation and segregating children from their gentile neighbours. It was perceived that parents usually preferred to send their children to schools where they could mix with other South Africans in order to facilitate their integration into the broader community (Sherman, 2000). The marketing of the schools had to convince the parents that their children would gain and not lose in a Jewish environment. Eventually, through the work of some dedicated individuals, such as Rabbi Avida-Zlotnik, the first KD school eventually opened in 1948 with seven pupils and ended the year with 26 pupils.[34]

The years from 1948–1980 were years of remarkable expansion for the Board. In 1955 the first high school was established – King David Linksfield High (KDLH). KDLP was later divided into a primary school (grades 4–7) and a junior school (grades 1–3) (KDLJ). A second King David primary school was established in Victory Park (KDVPP) in 1960 to serve the needs of the burgeoning Jewish population in the western and northwestern regions of Johannesburg. A few years later a high school (KDVPH) was established there. In 1982 another primary school, King David Sandton (KDS), was established to accommodate the young Jewish population moving to the northern suburb of Johannesburg, Sandton. Cape Town had its own administration, but later became affiliated to the Board. Durban, Pretoria and Port Elizabeth maintained Jewish day schools affiliated

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[34] *History of the SA Board of Jewish Education*, unpublished document, SABJE, 21 March 1991.

to the Board. By 1967, 14 day schools were affiliated to the Board catering for 30% of the Jewish population of school age (5,500 pupils). By 1980 the percentage was estimated at 60%, and by the year 2000 it exceeded 80% (Shimoni, 2003). The expansion of the Jewish day school movement echoes the trend in other countries such as the United States (Wertheimer, 1999; Kasoff, 1993) and the United Kingdom (Miller, 2001).

The success of the Jewish education system in South Africa can, to a significant extent, be regarded as the product of South African society (Steinberg, 1989). A combination of factors contributed to its success, both "push" (away from public education) and "pull" (towards Jewish education) factors. The most significant "pull" factors include the following:

- The destruction of European Jewry and Jewish culture had produced a feeling – sub-conscious or conscious – that all surviving Jewish communities were heirs to those who perished and therefore had a duty to pass on their tradition and heritage (Katz, 1980). At the same time, Jewish identification was enhanced by the creation of the Jewish state (Hayman, 1988). Sherman (2000) further suggests that Israel's military successes and the outburst of anti-Semitism from the Afrikaner government – especially around 1961 when Prime Minister Verwoerd cut off South African Jewish funds to Israel in reprisal for Israel's vote in the UN against South African racism – encouraged the Zionist feelings of otherwise indifferent Jewish parents.

- Uncertainty about the future prompted many South African Jews to consider *aliya* (emigrating to Israel); hence the importance attached to a sound Hebrew-based education for their children.

- The advocates of Jewish day schools argued that only a Jewish atmosphere – where a child can build his/her Jewish identity and experience a complete sense of belonging with no minority inhibitions – could produce a well-balanced and harmonious person (Shimoni, 2003). This resonated well with the deeply rooted ethnic identification of Jews and other ethnic groups in South Africa.

- Some parents were attracted to the sound academic standards and the Jewish day schools' small classes.

- Some parents sent their children to the schools because of social pressure, or simply because it had gradually become fashionable.

The most significant "push" factors include the following:

- The fear of assimilation as well as the wish to avoid anti-Semitic encounters.

- Dissatisfaction with educational standards at government schools.

- As a response to official South African government policies concerning education, specifically the enforcement of the Calvinist doctrine of Christian National Education at public schools.

- The failure of the afternoon schools to attract pupils beyond *Bar/Bat-Mitzvah* age and the perceived lack of commitment to Jewish learning at these institutions. It seems that pupils resented the afternoon schools which they were forced to attend, in addition to normal secular schooling (Casper, 1972).

By the late 1970s and 1980s the KD schools grew in spite of emigration and the dwindling Jewish population. There are a few reasons for that paradoxical growth. First, it became increasingly common for Jewish parents to send their children to a private Jewish day school. Second, demographic changes shifted most Jews from the small communities scattered around South Africa into the cities of Johannesburg and Cape Town, thereby affecting the growth of the Jewish day schools. Third, the community was concerned with the enactment of a National Education Policy Act in 1967, which required that all education in state schools would have a "Christian character".

During these years the Board had to face some fierce competition from private colleges such as Eden and Damelin, which offered (even guaranteed) better academic results in the matriculation examinations (Katz, 1980:420). Over the past two decades these schools have become less attractive to Jewish parents, while the KD schools consistently produced a 100% matriculation pass rate.

With the decline of the Zionist ideology in the late 1970s and the emergence of religious activities, religious schools such as the Zionist-Orthodox Yeshiva College became a viable alternative for some KD parents who wished to have their children educated along stricter orthodox-traditional lines. Yeshiva College differed from the KD schools regarding the extent of the Jewish studies programme. Central to the curriculum are the *Limudei Kodesh* (literally, sacred studies), which are separated from *Limudei Chol* (secular studies). As the *Ba'alei Teshuva* movement grew, it established schools for its communities. The proliferation of these schools perceived to reflect the "balkanisation" of the Jewish community (Rubenstein, 1999). These institutions were established around the Glenhazel area. The Lubavitch *Chassidic* movement established its own school in 1982, known as Torah Academy, which caters for hundreds of pupils. *Sha'arei Torah* is a *charedi* school in

the *Mitnagdim* tradition. It was established in the suburb of Yeoville in 1978 and has served the Ultra Orthodox community. It was taken over by *Ohr Sameach* in 2002.[35] There is less emphasis on secular studies at these schools, while religious studies take priority (Hayman, 1988). By the late 1990s a number of small Ultra Orthodox schools were operating in Johannesburg. The different Jewish views of these schools created a situation where in the year 2000, 60 high school boys were spread among four *charedi* schools. All were reliant on the community for financial support.[36]

In spite of competition from the other religious schools, the early 1990s were years of further expansion for the KD schools. After South Africa's transformation to democracy in 1994, concerns about overcrowding and falling standards in public education pushed white middle-class families to seek alternatives. Subsequently, parents who may not have been especially committed to Jewish education nonetheless saw the Jewish day school as the best option. Table 1 shows that the schools' enrolment peaked in 1996.[37]

Table 1 – Enrolment figures

Year	KDLNS	KDLJ	KDLP	KDLH	KDVPNS	KDVPP	KDVPH	KDS	YFNS[38]	Total
1984	300		922	1136	162	666	542	305		4033
1985	315		840	1126	141	624	582	361		3989
1986	306		757	1090	163	536	572	340		3764
1987	309		721	1162	147	475	559	374		3747
1988	331		763	1214	169	429	564	383		3853
1989	330		872	1218	161	428	532	433		3974
1990	350		908	1268	151	442	518	521		4158
1991	345	443	501	1264	150	451	522	580		4256
1992	353	429	563	1221	145	434	511	630		4286
1993	306	461	552	1071	136	427	405	673		4031
1994	325	474	565	1078	141	422	464	660		4129
1995	352	507	648	1052	132	448	512	670	109	4430
1996	**354**	**492**	**651**	**1110**	**138**	**454**	**545**	**657**	**116**	**4517**
1997	340	452	591	1067	130	455	565	602	106	4308
1998	302	425	575	1037	134	437	558	572	104	4144
1999	293	423	551	1023	130	412	544	519	111	4006
2000	292	427	523	1048	123	396	529	455	116	3909
2001	195	479	511	997	86	422	445	405	114	3654
2002	182	484	485	985	76	374	423	386	120	3515
2003				860		343	386			

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[35] New Sha'arei Torah opens its door. *SA Jewish Report*, 15 February 2002.
[36] Chief Rabbi Harris, Task Force Report, the South African Jewish Day School System. Comments by Chief Rabbi Harris. Unpublished letter, 21 October 2002.
[37] See also: Full days schools reflect optimism. *Jewish Times*, 26 January 1996.
[38] Yiddish Folk Nursery School (YFNS) joined the Board in 1994.

But the expansion was not evenly distributed among the different KD schools. There was a noticeable decrease in the number of pupils attending KDVP. The declining numbers were attributed to demographic changes – Victory Park became an aging community and young couples were settling mainly in the Sandton or Linksfied areas. Furthermore, children from KDS – a feeding school for both high schools – preferred to go to Linksfield, owing mostly to the better sporting facilities, the social appeal of a bigger school and accessibility (a highway connects the Linksfield and Sandton areas). In order to have a more balanced distribution of pupils in the high schools, the Board instituted a zoning policy in 1994 whereby children from designated suburbs would have to go to Victory Park High School. This policy was highly contested and was withdrawn after two years. It was perceived that it encroached on parents' freedom of choice, and that the Board made too many exceptions and did not adhere to its own rules.[39]

The growth of the Jewish community schools in the 1990s echoed a global (Tooley, 2001) and a local (South Africa) growth of independent schools, especially religious schools and schools for-profit (Hofmeyr & Lee, 2002; Du Toit, 2002; Henning, 1999). The growth of the latter pointed to the fact that there were many entrepreneurial individuals and corporations interested in making a profit by tapping into the strong quantitative and qualitative demand for education in South Africa (Hofmeyr & Lee, 2003). One such example is Crawford College. The Crawford Colleges boast modern amenities and highly qualified teachers, which they recruited from other schools (including the Jewish day schools) by offering them attractive packages. Moreover, the Crawford schools target specifically Jewish children by offering them Jewish and Hebrew Studies as well as *kosher* food.[40] The College also came to an agreement with Jewish communities in Durban and Pretoria and purchased their schools, which were previously affiliated to the Board.[41]

After 1996 the KD schools began to lose pupils at an average of about four percent of their enrolment a year. The number of Jewish pupils at public schools was significantly reduced and the schools lost this source of new recruits. The KD schools had to face some new and old problems. The old ones included the burden of rising costs and the nature and extent of the Jewish education that the schools should provide. The new problems included the influx of pupils who traditionally would not have attended the Jewish community

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[39] Transcript of meeting at King David Primary School, Sandton, 2 May 1995; Letter to parents, 11 September 1995.
[40] Rounded Jewish Education at Crawford College. *SA Jewish Report*, 3–10 July 1999.
[41] Carmel Pretoria drops out of the Jewish Day Schools. *Jewish Times*, 2 December 1994.

schools. Those included pupils with learning disabilities, and those whose families could not afford the fees.

With the political transformation in South Africa, the Board also had to confront some new dilemmas; namely, whether the Jewish day school's policy of admitting only Jews – and hence white students – would be regarded as discriminatory,[42] whether the schools would continue to receive subsidies and what degree of state intervention, if any, there would be on the curriculum and school policy (Rubenstein, 1995). In that transitional context the Board had to resolve its own internal tensions and conflicts while simultaneously adapting to the transformation of South Africa from a divided society to a united and democratic nation. The new South African government was largely antagonistic towards the independent sector on financial, ideological and political grounds (Herman, 2003). The Board therefore had to face its challenges in an environment that was perceived to be increasingly hostile to its existence. The feeling was that the Board, as an independent school, *'will increasingly have to look to itself to provide the resources and services that were hitherto the responsibility of the state'* (Rubenstein, 1999:74).

The Jewish ethos of the KD schools

The central challenge for the Board was to agree on the type, and extent, of Jewish education that the institutions under its control should provide. Should they reflect the Zionist/secular/national aspect of Judaism or should they reflect the Orthodox/religious/ traditional Jewish ethos? The religious diversity of the homes from which pupils are drawn has militated against any clear declaration regarding normative patterns of observance. This lack of clarity has been criticised, with people saying that the schools are not in essence "Jewish schools", but rather "private schools for Jews".

A few dichotomies need to be balanced in order to determine the Jewish ethos of the schools, namely the dichotomies between:

- the secular and the Jewish curriculum;
- the national/secular/Zionist and the traditional/religious aspects within the Jewish curriculum;
- Hebrew as a modern communicative language for the national/Zionist/secular purpose and Hebrew as a sacred language for religious/traditional and ritual purposes; and

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[42] Jewish Education in SA under a new government. *Zionist Record*, 24 June 1993.

- Jewish Studies for ethnic identification (history and customs) and Jewish Studies for religious experience (Jewish practices and laws).

Bridging these dichotomies depends on internal and external factors, on financial viability and on a strong management that can hold these tensions in balance. The following sections will elaborate on these issues.

<u>Balancing the dual curriculum</u>

The paradox of the Jewish day schools is that in spite of the rhetorical commitment of parents to Jewish education, achievements in secular studies and sports are the most important criteria by which the schools' success is measured. From the 1980s, however, the increased competition from other religious schools motivated the schools to assess their own religious programme. It was realised that Jewish learning had a low status at the schools and that Hebrew and Jewish Studies teachers were demoralised, feeling that their contributions were not appreciated. It seemed that general teachers *'looked down upon their colleagues in the Jewish field and upon Judaism. One snide remark on the part of a good general teacher can wipe out a year's work'*.[43]

In order to bridge this dichotomy the Board decided in the 1980s that *'general teachers must be Jewishly educated … they must be invested in … they must understand what Judaism is all about, and what the Jewish school stands for'*.[44] Subsequently, many general teachers were reskilled in content and teaching techniques for the integration of Jewish-related topics into the general curriculum.[45]

Still, secular subjects are paramount in the curriculum at the KD schools, while Hebrew language and Jewish Studies fit into the general timetable without occupying a specified portion of the day. Out of an average of 40 teaching periods a week in the primary schools, about 10–12 periods (each of 30–35 minutes' duration) are dedicated to Jewish subjects. In the more religious schools, such as Yeshiva College or Sha'arei Torah, considerably more time is dedicated to Jewish Studies, particularly to the more traditional kind, namely *Torah*,[46] *Mishna*,[47] *Gemara*[48] and *dinim*.[49] At these schools there is a clear

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[43] A short summary of the proceedings of a seminar for lay leaders and professionals of the SABJE, Feb 1983. Unpublished document compiled by Mazabow and Isserow.
[44] ibid.
[45] Hoffman, A.D. Report on Consultation to South African Board of Jewish Education, The Hebrew University, Jerusalem. November 11–19, 1983.
[46] A term applied both to the entire corpus of sacred literature and to the first section of the Hebrew bible, that is the *Chummash* or the "five books of Moses".

separation between the Jewish, *Limudei Kodesh*, and the secular, *Limudei Chol,* subjects. There are usually two principals, each responsible for one part of the dual curriculum. At the KD schools there is one principal, while the Head of Hebrew occupies a deputy or vice-principal role. Jewish Studies generally falls under the auspices of the Hebrew department at the primary schools, but functions as an independent sector at the high schools.

Balancing the Jewish ethos

As mentioned earlier the Board was formed on the initiative of the Zionist Federation and the Jewish Board of Deputies. From its inception Jewish education was therefore not conceived purely as a function of the synagogue, but was aimed rather at integrating Zionism with the traditional mode of Jewish identity. This reflected the community's normative mode of ethnic identification as described earlier. Achieving the balance was, however, a subject of sometimes-heated controversy. The *Mizrachi* (the religious Zionist movement) demanded a full commitment to Orthodox observance and the total exclusion of Progressive Judaism's (Reform) schools. It also rejected the superficial religious content and the lax approach to Orthodox observance at the Board schools. Zionist members on the Board wanted to include all those who desired a Jewish education. Undoubtedly, the underlying debate was around the question of "Who is a Jew?". In those early idealistic years preceding the creation of the State of Israel, the Zionist members of the Board wished to emulate the Zionist dream of the return of all Jews:

> My difficulty is that [the strictly traditional-national formula] excludes some Jews and the Board of Education is a board of education for the whole of South African Jewry, and I am troubled because I would like to know what would be the consequences if similar policies on a similar line were adopted in other fields of activity; if we Zionists, for instance, excluded Jews who are not religious Jews, from Palestine? Should we insist that Jewish life in Palestine be built only on the traditional way, or do we say to ourselves that all Jews must come to Palestine, whether they be the left or the right, religious or irreligious, whatever they may be? As long as they say that they are Jews they must come to Palestine, and the Zionist Organisation follows that in the Diaspora. The Board of Deputies represents and embraces all Jews in this country. It is not going to say that this is a "kosher" Jew and this is not a "kosher" Jew. You must not allow yourselves … to exclude even ten Jews, because they are still Jews … it is no use Rabbi … saying that members of the Reform congregation are not Jews. They are Jews.[50]

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[47] The Oral Law compilation dated approximately 200CE, which serves as the foundation text for Talmudic law and tradition.

[48] The usual designation for the commentary and discussions on the *Mishna*. The *Mishna* together with the *Gemara* make up the *Talmud*; that is, the collected teachings of the major Jewish scholars who flourished between 200 and 500CE.

[49] Religious laws.

[50] Minutes of the fourth session of the 7th national conference of the SA Board of Jewish Education held on Sunday evening, 8 p.m., 4 March 1945.

A compromised formula was reached on the 7th conference of the Board in 1945 between the proponents of "strict traditional-national" (meaning Orthodox-Zionist) education on the one hand, and of a laxer and more secularised national (Zionist) outlook on the other. It was decided that the Board would promote and coordinate *'Jewish education based on broadly national traditional lines, it being understood, however, that the Board will render educational services to any institution which requires and applies for such service'*.[51]

This compromised formula did not satisfy the needs of the leaders of *Mizrachi* who had unsuccessfully fought for the wording to be "*strict* national traditional lines" but they had succeeded in ensuring that Reform Judaism would have no voice on the Board of Education or in the formulation of the curriculum. In 1952 the *Mizrachi* movement, as mentioned earlier, established its own school – later known as the Yeshivah College campus. Significantly, even though the *Mizrachi* movement did not consider the community school adequate in a religious sense and subsequently opened its own school, it did not abdicate its role as the guardian of the Orthodox-religion component of education at the Jewish community schools and still retained its voting power on the Board.

The formula of *'Jewish education based on broadly national traditional lines'* was the brainchild of Rabbi Isaac Goss, the Board director and intellectual mentor from 1949 to the 1970s, who managed to hold the diversity in balance. Thus the "traditional" facet of the formula aimed to expose pupils to a modicum of observance and knowledge of basic texts, concepts, rituals and values of Orthodox Judaism, while the "national" facet aimed to foster identification with the Jewish national revival, epitomised by the Zionist movement and Israel. The adoption of the adjective "broadly" instead of "strictly" signified a tolerant and uncoercive attitude towards the question of actual observance, thereby reflecting recognition of the rather lax mode of observance in most pupils' homes and the South African Jews' normative code of identity.

Accepting the compromised formula did not put an end to the ideological disagreements amongst the members of the Board, which was exacerbated by the clash of personalities among the leadership. For this reason the Board invited Professor Zvi Adar, a notable educationalist at the Hebrew University in Jerusalem, to study and assess the Jewish education provided by the Board, to identify its problems and to suggest solutions (Katz, 1980). Adar was a pure educationalist and was not interested in politics. He was

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[51] Ibid.

therefore highly critical of the tensions within the Board, and the exclusion of the Reform movement. He argued that this meaningless and arid so-called ideological struggle had impeded educational work. Adar also pointed to the inherent contradictions in the national-traditional formula and questioned its achievements. The report was not welcomed by most of the new rabbis who began arriving in the country at that time, demanding that the schools become more religious. It was not published in South Africa and was not open to public scrutiny (Katz, 1980) even though many of its recommendations were followed by the Board. Moreover, the report was written in Hebrew and therefore had a limited readership anyway.

In the 1980s local educationalists continued to debate whether the national-traditional formula was still suitable or representative of the community. This was expressed in an address to community leaders by a principal of the Jewish day school in Cape Town:

> This question of definition and application is thrown into sharp focus when we consider that the bulk of our community are neither national – witness the exodus of most émigrés to Diaspora countries rather than to Israel, neither they are traditional – our empty synagogues testify to that … (Kaplinsky, 1987:11).

While the debate continued it is safe to say that at least until the late 1980s the Zionist/national/secular ingredient of Jewish education played a formative role in developing the Jewish ethos of the schools. As mentioned earlier, this was reinforced by South African society, which fostered and legitimised a Zionist mode of Jewish identity.

During this time, the Orthodox rabbinate consistently expressed its concerns about the shortcomings in the religious character of the schools. The main issue was whether the schools should mirror the normative behaviour of society, or assume the role of challenging society. For the rabbinical establishment the answer was clear:

> The school must adopt an active and constructive role of teaching, of seeking to change and improve, of raising standards … therefore … we must give it to [the pupil] even if his parents cannot or will not give it to him (Casper, 1972:186–187).

> All too frequently one meets the absurd fear lest "too intensive" a Jewish education will make the pupils "too Jewish". This is a reflection of a wide-spread desire to keep the community going along an even, mid-way, course, shunning extremes, having a regular nodding-acquaintance with religious institutions but careful not to take them too seriously except maybe occasionally. This is the "status quo" which many would like to see perpetuated. But this cannot be (ibid:194).

The Board continued to resist the application of more Orthodox norms and practices and insisted on continuing with its more liberal approach. It advocated the notion that the

schools meant to accommodate children *'representing all sides and degrees of Judaism, from traditionally orthodox families and Reform, from Zionist and Jewish-culture-orientated units as well as those from homes with no Jewish commitment at all'*. It is therefore necessary for the Jewish schools to be democratic, *'otherwise anger and resentment would flow from any dogmatic statements or actions'* (Sarzin, 1982:32). A flexible attitude therefore prevailed in the Jewish community schools, despite the fact that official religious ethos was that of Orthodox Judaism (Steinberg, 1989:371).

During the late 1980s and early 1990s the status quo had begun to shift as the community began turning towards greater religiosity, as well as with the appearance of charismatic rabbis and competition from other religious schools. The Board gave in to pressure to reinforce the traditional ingredient of the ethos. In the inner circles it was observed that the then Director of the Board, Mr Zimmerman, an ardent Zionist, was constantly "looking over his right shoulder".

In 1995 the designated new Director of the Board, Rabbi Rubenstein, still repeated the "broadly national-traditional" credo as uniquely suited to the values and perspectives of South African Jewry. Nonetheless, he argued that the schools perpetuated *'a strong uncomplicated Jewish identity, but little content knowledge'* (Rubenstien, 1995:55). Rubenstein observed that students usually cooperated and adhered to the Jewish-practice dimension of the daily routine, and thus they mirrored the tolerance and the respect that the Jewish community held for Orthodox Judaism. He expressed the need to re-evaluate the Jewish Studies curriculum, but complained that the headmasters of the schools, who did not have a sense of crisis in that area, received this suggestion with scepticism. He further argued that the transformation of South African society after 1994 would change the forces in society that had been so successful in artificially maintaining Jewish identity. He predicted an increasing pressure to conform to an overarching South African identity, and a delegitimisation of primary allegiance to an ethnic-national group. Energised by the euphoria of the 1994 election Rubenstein urged for a broadening of the credo in order to accommodate those marginal Jews who were active in the struggle against apartheid and had been "rediscovered" by the community. In a frank comment Rubenstein conceded that:

> It is clearly in the interests of the Jewish establishments to acknowledge as Jews those who are now in a position of authority, power or favour owing to their participation and sacrifice in the years of the "struggle" – as much as it was in its interests to distance itself from them during the years of apartheid. It is interesting to speculate as to whether these high profile Jews, who will increasingly be co-opted by the community, will ultimately have the effect of changing the generally held conception of what a Jew is, or more importantly, what he does Jewishly. The community could be nurturing new Jewish role models, which stress

human rights and morality – with weak, if any, ethnic religious roots – and primarily South African orientation (Rubenstein, 1995:57).

While attempting to reinforce the traditional ingredient of the ethos, Rabbi Rubenstein reaffirmed the role of the Jewish community schools in ensuring that all the Jews of South Africa – those who were moving towards stronger Jewish commitment as well as those slowly drifting in the opposite direction – *'remain at the centre of things, offering a comfortable home to as broad a range of children as possible'* (1999:76).

At the same time the Chief Rabbi continued to express his dissatisfaction with the level of Judaism practiced at the schools. He maintained that the schools were not achieving their goal of instilling the "national-traditional" ethos, and blamed this failure mostly on the families:

> The key failure rests with the motives of the parents. The axiom that Jewish parents send their Jewish children to Jewish schools to obtain a sound Jewish education is simply untrue. The real reasons for their choice revolve around ethnicity – to mix with fellow Jewish children; fear – to avoid anti-Semitism; and secular educational ambitions – to attain university entrance; but not – please not – that their children should be given a sound Jewish education! (Harris, 1995:51).

The narrative so far has demonstrated that while the national/secular/Zionist ingredient of the Jewish ethos of the schools was predominant until the 1980s, in the 1990s the balance shifted towards the traditional/religious ingredient of Jewish education. South Africa's transformation to democracy and its search for a national identity have produced two conflicting forces in the Jewish community: one pulling towards democracy by broadening the community of the Jewish schools to include Jews that have been marginalised before owing to their liberal and anti-apartheid stance; and another contrary force pushing towards ethnicity and exclusivity and towards a stricter expression of Jewishness in the schools.

This ideological struggle over the function and type of Jewish education found its practical expression in the syllabus and teaching styles of two subjects: Hebrew and Jewish Studies – that is, between Hebraic education and Judaic education. Each subject is, however, imbued with tensions and conflicts, as the following sections will demonstrate.

Balancing the Hebrew curriculum[52]

As alluded to earlier, Zionism was defined, to a large extent, in linguistic terms through the revival and transformation of Hebrew from a written to a vernacular language (Dieckhoff, 2003; Shohamy, 1999). Hebrew was therefore a symbol of the new Jewish identity. It was believed that Hebrew would unify and standardise all segments of Jews under one common roof, with one common identity. Hebrew language nowadays is perceived to be an indispensable key to understanding and appreciating Israeli society and culture. Moreover, to know Hebrew is to enjoy direct access to the Jewish culture, since the Bible and the works that followed – the *Talmud* and the *Mishna* – are written mostly in Hebrew.

Yet the application of language identity manifested itself differently in Israel and in the Diaspora. While in Israel Hebrew has become the hallmark of Israeli identity, in the Diaspora, the role of Jewish language in maintaining identity is minimal and decreasing rapidly (Shoamy, 1999). It is English rather than Hebrew that emerged as the *lingua franca* of the Jews towards the end of the 20th century. It is perceived that most Jews in the Diaspora maintain their identity without maintaining a Jewish language and that Hebrew has become only one symbol of identity along with other symbols such as education, affiliation to a synagogue, religious observance, etc. (ibid). This phenomenon occurred despite efforts to make Hebrew a language of communication and despite the fact that the teaching of Hebrew was considered as the *raison d'etre* of the Jewish day schools and the "nerve centre" of Jewish learning (Goss, 1964; 1985). Five decades after the establishment of Israel, many Hebrew schools have abandoned their commitment to the teaching of Hebrew. Teaching Hebrew in the Diaspora has been regarded as a '*dismal failure'* (Breakstone, 2002:9).

To explain this phenomenon Shohamy (1999) differentiates between contextual and pedagogical factors. While the quality of the pedagogy is very important to the success of learning language, the context may override or affect pedagogical factors. It is often believed that while it is possible to change the pedagogical factors there is little that can be done to change the context. Among the contextual factors Shohamy includes the relation to Israel as paramount. She maintains that the adoption of Hebrew as the language to be taught in Jewish schools in the Diaspora was motivated to a large extent by identification

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[52] While this section is based on documentation as much as possible, it is also based on my intimate knowledge of the topic as I worked in managerial positions for the Department of Hebrew Studies at the Board from 1993 and headed it from 1998 to 2001. During that time I conducted conversations with experts worldwide and attended workshops on the topic of Hebrew teaching. Some of the information was either not documented or the documentation was not available while writing this dissertation.

with Zionism, reflecting the centrality of Israel within Jewish communities in the Diaspora. While the relationship between Israel and Diaspora communities was close at the time of the establishment of the State, this is changing drastically. This change is clearly reflected by the loss of the centrality of the Hebrew language as a symbol of Jewish identity. At the same time the failure of most children to acquire even minimal fluency in the language contributes to growing disappointment and frustration among parents and children. Shohamy argues that these feelings must undoubtedly impinge upon pupils' self-regard and confidence as learners, their motivation to study additional languages, their perspectives on Jewish Studies, and their general attitude towards the Hebrew language, and thus towards Zionism.

The history of the KD schools exposes a similar struggle and failure to make Hebrew the "nerve centre" of Jewish education. Based on the Zionist orientation of the schools, Hebrew was a compulsory subject at KD since its inception, and pupils were expected to choose Hebrew as a matric subject. Problems arose in the high schools when some pupils refused to do this. These were often pupils who had moved from public schools to the Jewish day schools and therefore had no background in Hebrew, or those pupils who struggled academically and were in the remedial or special groups. It was, however, not uncommon for bright pupils to fail Hebrew intentionally so as to be allowed to drop the subject in matric. Although the figures vary, Mink (1984) reported that in the early 1980s already 25% of pupils did not study Hebrew at matriculation level. By the late 1990s the number of dropouts in Hebrew had increased to about half. The problem that the Board faced was what to do with pupils who refused to take Hebrew for matric. The decision as to whether a pupil could drop the subject was in the hands of the school and the Board and it often depended on the personalities and power of those involved. Subsequently, some pupils had to leave the school, some were forced to continue with Hebrew, while others managed to stay on at the schools and to take another subject for the matriculation examination. This resulted in a loss of income for the schools, the loss of good pupils and growing antagonism towards Hebrew as a subject.

Until the 1990s, the refusal of the National Party to allow Jewish Studies to become a matric subject helped Hebrew to retain its privileged position (more about that later). But once Jewish Studies was recognised as a matric subject (in 1994) it became a viable alternative. Still, it was up to the school and the Director of the Board as to whether a pupil would be allowed to drop Hebrew. The Hebrew department was keen to keep the stronger pupils who could achieve distinctions in the matric exam, while it was willing to allow the

weak and difficult pupils to take Jewish Studies for matric. At the same time there was pressure from various stakeholders to give pupils a free choice of subjects. This attempt at free choice, however, failed for two main reasons: first there was a fear that making Hebrew optional would eventually marginalise the language as fewer pupils would opt to study it for matric,[53] and second, it was perceived that there were still enough experienced Hebrew teachers who could teach at matric level but very few Jewish Studies teachers who could prepare pupils to take the final exam.

The Hebrew curriculum at KD schools attempts to represent both the national and traditional ingredients of the Jewish curriculum. The curriculum therefore includes the teaching of Hebrew as a modern communicative language as well as the teaching of the Bible, prayers and other Jewish texts. For this reason it was regarded as a *'compromising syllabus'* (Goss, undated:27). It was, however, perceived that the Hebrew curriculum was biased towards the Zionist/national ethos:

> The dictate of Rabbi Goss [Director of the Board from the 1940s to the 1970s] determined that there was to be only Hebrew with a Zionist slant in South Africa's Jewish day schools. Indeed, it often seemed to members of my generation that learning modern Hebrew was more important than studying our scriptural and liturgical heritage (Sherman, 2000:35).

A practical expression of the importance of modern communicative Hebrew was the introduction in 1963 of an annual *Ulpan*[54], whereby Grade 10 pupils were sent to Israel on an intensive three-month Hebrew Studies course, supplemented by educational tours and work on a *kibbutz*. The *Ulpan* programme had two major drawbacks: one was the escalating costs which excluded those pupils who could not afford the payment; and the second was the lack of agreement regarding the level of religious observance on this programme, which was perceived by the religious establishment as being too secular (Casper, 1972). The argument was whether pupils should experience religious observance in Israel or rather experience the secular/Zionist Israel – Israel as a modern country.

Hebrew and Zionism were also inculcated in an informal way through the celebration of Jewish festivals. This was mostly the role of the Hebrew Department, which gave much emphasis to national milestones such as Israel Independence Day, and less emphasis to minor Orthodox festivals.

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[53] This was the case at other Jewish day schools. Once Hebrew became optional very few pupils chose it as a matric subject.

[54] An immersion programme in Hebrew designated for new immigrants in Israel. In South Africa the word *Ulpan* describes a programme for learning communicative modern Hebrew.

A major concern for the Board was the recruitment and training of Hebrew teachers, as well as their level of religious observance. There were three main sources of teachers with most being the product of the local seminary. The Board established a seminary in 1944 in order to train Hebrew, and later (mid 1980s) Jewish Studies, teachers for the schools. The three-year programme was recognised by the Israeli Ministry of Education and by the South African Department of Education. The graduates were either South African or Israeli-born women who happened to reside in South Africa. The seminary was, however, officially closed in 1997 owing to a paucity of students and a shortage of finances.[55] At the time of its closure the seminary still continued to train Jewish Studies teachers, but it was housed at the pedagogic centre adjacent to the Board's offices. Later on, in 1999, another course for Hebrew teachers was initiated. This was an abridged two-year programme, and the students were all Israeli women. By that time there were new regulations in South Africa with regard to teachers' qualifications and the Board was unable to receive recognition for the course.[56]

The second source of teachers was from among the *shlichim* (emissaries) from Israel. With the chronic shortage of Hebrew teachers and the problem with finding local expertise especially to run Hebrew departments at the high schools, the Board tended to bring in senior teachers from Israel. These *shlichim* had to meet three basic requirements: they had to be observant; Hebrew speaking; and qualified teachers – of any subject, not necessarily of Hebrew (Sherman, 2000). There were a few drawbacks with this approach. First, the teachers came for a short period of three to four years and they were usually not qualified to teach Hebrew as a foreign language. As soon as they adjusted to the South African milieu they had to return to Israel, thereby breaking continuity (Mink, 1984). Second, the declining value of the rand made this practice expensive. Third, South Africa was not an attractive destination for top Israeli educators who preferred less turbulent Western countries.[57] I think it is safe to say that since 1990 there have been no Israeli *shlichim* from Israel teaching Hebrew at the KD schools.

The third source of teachers was the graduates of the Hebrew departments at the University of the Witwatersrand in Johannesburg and the University of South Africa (UNISA). However, both these departments closed in the 1990s, and another potential source of teachers dried up.

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[55] SABJE, Twenty Fifth National Conference, 7– 8 March 1998.
[56] The South African Council of Educators, SACE Act, 2000 (Act 31 of 2000).
[57] *Jewish Education in South Africa, Proposal to joint programme for Jewish educators – World Zionist Organisation.* Document dated 26 August 1986.

From the 1990s the profession was therefore depleted, both quantitatively and qualitatively. Furthermore, the shortage of Hebrew teachers is a global phenomenon and Australian Jewish day schools have been known to approach Hebrew and Jewish Studies teachers in South Africa with an offer of moving to their country.

The religious observance of the teachers was another bone of contention between the liberal and conservative voices in the community. From the beginning the *Mizrachi* leaders demanded that the teachers and educationalists who taught Jewish education should be religious men. It was perceived that religious observance should be taught by example, and that little value could be achieved *'by insisting upon an observance which the pupils know is not shared by the teachers and principals and guides'* (Casper, 1972:195). The demand was opposed by the Zionist leaders (Shimoni, 2003). The Board eventually decided that *'as long as [the Hebrew teachers] are not anti-religious they need not necessarily be observant'* (Casper, 1972:195). It was perceived that progress in Jewish education at that stage would be achieved by concentrating on raising the qualitative and pedagogical skills of the teachers rather than by indulgence in *'barren controversy'* about their level of observance (Goss, undated:27). This debate continued, but for practical reasons the seminary and the schools had to accept non-observant candidates.

In the late 1990s it became apparent that KD graduates were not Zionistically inclined, and the Hebrew Department was blamed for this perceived failure. The Chief Rabbi pointed to the Israeli teachers for the failure of the schools to instil a national-traditional ethos:

> Yet Israeli teachers, mostly *yordim*,[58] are not in a position to advocate positive Zionism, let alone *aliya*. Nor can a traditional worldview or Jewish lifestyle be transmitted by teachers with no personal predilection or association with them (Harris, 1995:51).

The Director of the Board, adopting a pragmatic approach, was concerned that this supply of teachers would be threatened with the return of this population to Israel (Rubenstein, 1999).

To sum up, it is clear that the Jewish day schools in their first 40–50 years of existence stressed Hebrew language and Israeli-orientated subject matter, thereby emphasising the Zionist/secular/national ingredient of the Jewish ethos. Despite huge efforts, the success of these programmes has been debateable. A parents' questionnaire administrated by the PTA of KDVPPS concluded that too many hours were dedicated to

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[58] An outdated term used to describe those Israelis that left Israel with a clear undertone of betrayal of the Zionist dream, placing personal, selfish needs above national loyalty and higher values.

Hebrew and prayers, which the parents regarded as one of the least important subjects.[59] Yet in a meeting at the high school parents expressed their wish to continue with Hebrew as long as it became more communicative.[60] It seems that Hebrew has maintained some status as the "imagined community" for South African parents in rhetorical rather than practical terms, indicating their continued loyalty to the Zionist ideology. At the same time, the pupils were perceived to have remained comparatively ignorant of the religious aspects of Jewish life (Steinberg, 1989). This criticism was voiced regularly at conferences of the Board.[61] In the 1990s, however, with the community turning towards greater religiosity and the South African government shifting its emphasis from ethnicity to multiculturalism, the status of Hebrew Studies began to decline while that of Jewish Studies improved.

Balancing the Jewish Studies curriculum

Jewish Studies as a subject was introduced in 1975, comprising Jewish history, laws and customs, Jewish thought, the history of Israel and *Mishna*. The advantage of Jewish Studies was that it was taught in English; however, the subject was also imbued with contradictions and tensions.

The first issue was the status of the subject within the schools. Jewish Studies did not achieve recognition as a valid matriculation subject until 1994, despite frequent representations to the provincial authorities and the Joint Matriculation Board in this regard.[62] This led to a number of results. Some pupils related to Jewish Studies as an impractical extra burden while others developed expectations that it be an informal, "inspirational" subject – since it would not be formally tested. It appeared that pupils became progressively less interested in Jewish Studies as they "moved up" into and through their high school years.[63] Moreover, much of the reputation of the KD schools rested on its perceived ability to get "results" from students as far as matriculation grades and university entrance were concerned. The matriculation exam functioned, among other things, as an organiser of status and hierarchy within the high schools. The Hebrew

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[59] King David VP Primary School, *School Survey*, April 2001.

[60] I observed that meeting at KDVPH as a parent, yet cannot recall the date.

[61] Saron, G. The struggle over 'Religion' in South African Jewish Education. *The Federation Chronicle*, Rosh Hashanah, 5741(1980). 14-15; 27-29.

[62] According to the ex-Director of the Board, Mr Zimmerman, the government excuse was that if they were to agree with this request, '*they would have to do the same for the host of other ethnic groups'.* Quoted in Jewish Education in SA under a new government. *Zionist Record*, 24 June 1993.

[63] Dr Rosenak, M. Reflection on my visit to Johannesburg on behalf of the SA Board of Jewish Education. Unpublished document, June 1982; Dr Dawn Butler (assisted by Prof. Pam Christie), Survey of Jewish Studies at King David Schools, November 1994.

departments at the high schools, being responsible for a matric subject, held themselves somewhat apart from the Jewish Studies departments. The lack of contact between the Hebrew and the Jewish Studies departments was a source of concern in the 1990s.[64] The separation was explained by the composition of the teachers, and by the reluctance of the Hebrew departments to relinquish their status:

> While the Jewish Studies department is manned almost exclusively by native-born South Africans who represent various shades of religious observance, including some "born again" Jews, the Hebrew staff, on the other hand, is constituted by entirely different "types": Mostly Israeli-born women with no particularly traditional backgrounds. The members of the two groups, then, would not "naturally" interact. To this may be added the fact that the Hebrew department prepares students for a matric exam well into Grade 12, while Jewish studies instruction stops after Grade 11 and in 1992 was not directed to any matric exam. This would seem to lend the Hebrew department at least some status, a commodity which one would not expect them to wish to share too readily.[65]

The second issue was the content of the Jewish Studies curriculum and the recruitment of suitable teachers to deliver the national-traditional ethos. Initially, the Jewish Studies curriculum was perceived to be too secular in its approach (Steinberg, 1989). Teachers were criticised for using an "objective" and almost totally informative approach to Jewish teaching, which functioned mainly to "cover" the material. The very normative approach to "tradition" was perceived to add a further element of objectification:

> "Judaism says" becomes an opening phrase for the imparting of objective information which is not exposed to serious questioning.[66]

By the 1980s Jewish Studies at both high schools was perceived to be in a state of crisis with regard to syllabus, available materials and teaching.[67] The imparting of Jewish knowledge was described as *'a casual affair'*.[68]

To complement formal Jewish education the Board introduced an Informal Jewish Education division. In 1986 the division introduced an encounter programme whose objective was to expose KD students to "fun Judaism" (Shimoni, 2003). The Informal Education division emphasised the effective experience of Judaism, that is, the observance of *mitzvot* (commandments) and *dinim* (laws), especially *Shabbat*. The programme was supervised by young Orthodox workers, mostly connected with the *Mizrachi* youth

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[64] Dr Jonathan Cohen – Report to the South African Board of Jewish Education, 1994.
[65] Ibid.
[66] Dr Rosenak, M. Reflection on my visit to Johannesburg on behalf of the SA Board of Jewish Education. Unpublished document, June 1982.
[67] Hoffman, A.D. Report on Consultation to South African Board of Jewish Education, The Hebrew University, Jerusalem. 11–19 November 1983.
[68] Rosenak, M. Reflection on my visit to Johannesburg on behalf of the SA Board of Jewish Education. Unpublished document, June 1982.

movement – *Bnei Akiva*. This in turn resulted in a flow of KD pupils into the *Bnei Akiva* youth movement. At the same time, the secular-Zionist youth movements, *Habonim* and *Betar*, were undergoing rapid decline.

In the 1990s the Board recruited instructors for the Informal Education division from the Ultra Orthodox *Ba'alei Teshuva* movement – *Ohr Sameach*. Consequently by the mid 1990s, the director of the Informal Education division, the Linksfield campus rabbi and some Jewish Studies teachers had come through the ranks of *Ohr Sameach*. This was perceived to threaten the "broadly national-traditional" ethos of the schools:

> These appointments reflect a new willingness on the part of the community to allow very traditional elements an expanded base of activities, even if they might have *charedi* overtones (or undertones). … this bespeaks a kind of turning inward on the part of the community. With events in the surrounding society proceeding in an unpredictable manner, people have a tendency to fall back on the "old verities" while subjecting those who would enthusiastically propound such verities to very little critical scrutiny. … This signifies a definite change in the emphasis in the kinds of Jewish messages being sent abroad at KD. *I would go so far as to say that the above trend represents the beginning of the erosion of the national traditional consensus that has been the guiding light of educational policy at KD since its inception* … While the technological trappings of modernity may be tolerated and instrumentally used for purposes of persuasion and attention getting, this is still a far cry from a serious engagement with the best that the West can offer. Similarly, while there may be much warm feeling for the land of Israel and the Jews who live there, this is not the kind of religious embrace of Israel as a modern state that has always characterised religious Zionism.[69] (My emphasis.)

In an open debate some parents expressed their fears about *'the fundamentalism which is creeping into the schools via teachers aligned with the Chabad (Lubavitch) and Ohr Sameach movements'*. The Director, Mr Zimmerman, maintained that *'the schools broadly mirrored the community, and as the community drifted towards the religious right, so did the schools'*.[70] Rabbi Rubenstein, the director designate, while acknowledging that *charedi* orientation would mark a departure from the overarching ethos of national traditional-education, conceded that a significant number of the better Jewish educators *'could be described as charedi to one degree or another'*. He argued that what was needed was *'to provide those educators with a clear understanding of what the schools do and do not stand for'*.[71]

The national-traditional debate has also been expressed in the Jewish Studies syllabi, which reflect an uneasy compromise between two trends: positive ethnic identity;

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[69] Dr Jonathan Cohen – Report to the South African Board of Jewish Education, 1994.
[70] Day Schools drift to religious right. *The Jewish Herald Times*, 11 March 1994.
[71] Rabbi Isadore Rubenstein, Working document on the report to the South African Board of Jewish Education by Dr Jonathan Cohen, August 1994. Jerusalem Fellows, September 1994.

and religious experience. In practical terms, should the students learn Jewish history, festivals and folklore, or should the teaching direct the students to a greater observance of the commandments? This conflict is clearly explained in the following excerpt from the report by Cohen:

> There were those who felt that a positive attitude to tradition and Jewish culture should be fostered with the aim of strengthening the Jewish self-concept of the student, while leaving "existential decisions" as to religiosity and observance to the individual. Others felt that the cultivation of a specifically religious dimension of experience should figure among the overall aims of the syllabus (the student should be made aware of 'God's expectations of him' or 'the presence of God acting in Jewish history', etc.). This latter group did not wish to see these religious dimensions as emanating from the student's "existential choice". … Tensions exist among the Jewish Studies teachers … there are those who see Jewish history and Zionism as forming the basis of Jewish Studies for the contemporary young Jew who may not be committed to the *Hallacha*. There are those who see Jewish studies more in terms of Jewish practices or Jewish beliefs. Some have the tendency to be more dogmatic, limiting student discussion and debate, although they might not think of themselves as such. Others give students the sense that they can express themselves freely in the classroom, and therefore that "Judaism isn't narrow minded". Most of them have pretty good rhetorical skills, although many do tend to monopolise the floor, perhaps in the fear that open discussion may cause discipline problems.[72]

The controversy extended further into the content of Jewish history. There seemed to be a focus on the history of Zionism and the Holocaust, which *'is liable to instil in the pupils a somewhat morbid view of Jewish history'* (Harris, 1995:5), while the teaching of modern and contemporary Israel was found to be the least successful area of the curriculum, leaving young graduates unable to defend or understand the political dilemmas in Israel from a Jewish perspective.[73]

The recruitment of teachers and their pedagogical skills was another constant concern. While in the past Jewish Studies teachers at the high schools were recruited from among the qualified history teachers, the new teachers tended to be *Ba'alei Teshuva* whose main qualification was the completion of the two-year programme at a seminary. It was therefore perceived that not all Jewish Studies teachers would be up to the task of preparing pupils for matric and that they would need to be retooled in order to teach the subject at that level.

Another problem that emerged once Jewish Studies became a matric subject, was the tendency of many matric examinations to be information-orientated, rather than thought-orientated. This was seen to spill over into the Jewish Studies area as well, making

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[72] Dr Jonathan Cohen – Report to the South African Board of Jewish Education, 1994.
[73] SA Board of Jewish Education, Strategic Planning, 1993. Unpublished document, 21 July 1993; Dr Jonathan Cohen – Report to the South African Board of Jewish Education, 1994; Rubenstein, Plan for the Development of Education in the Controlled Schools of the South African Board of Jewish Education, 1997–2000. Unpublished document.

both the exam and instructional preparation for it, incorrigibly dry. Jewish Studies teachers were criticised for using the "note system" which was prevalent at the KD schools, whereby students had become accustomed to having note summaries of lessons prepared and handed out to them by their teachers. The "note system" was perceived as particularly undesirable for Jewish Studies since pupils were getting pre-digested interpretations of Jewish sources masquerading as the authoritative tradition itself.[74] In other words, pupils were getting Judaism "third hand"[75] and were rarely given the chance to encounter a primary source, comparing conflicting traditional interpretations by offering their own interpretations.

The narrative has traced the transformation of Jewish Studies from being seen as "too secular" to becoming a base for Ultra Orthodox activities in the schools. It also follows the struggle of Jewish Studies – representing the traditional/religious ingredient of the Jewish curriculum – to achieve its status alongside Hebrew – the national/Zionist/ secular ingredient of the curriculum. The changes in South Africa, the decline of Zionism and the Jewish community's shift to religion, all changed the status quo, which until the mid 1990s had tended to privilege Hebrew Studies. At the same time it brought new challenges to the Board; namely, to set the goals and objectives for teaching the subject, to devise a curriculum that matched these objectives and to recruit and skill a suitable teaching force. It seems that while the Hebrew Department was perceived to have failed to achieve the national objectives of the ethos, the challenge was for Jewish Studies to achieve the traditional goals.

Exclusivity versus inclusivity

While the community and the schools seem to have turned inwards in the 1990s, democratic voices in South Africa began to question the exclusivity of the schools and whether or not they function as a white privileged institution, reminiscent of the apartheid regime. While Jewish communities worldwide tend to pursue democracy and liberalism as a safeguard for Jewish continuity, it also poses the danger of either assimilation or intermarriage. The challenge for the Jewish community was to invest in the new South African democracy without compromising its identity (Rubenstein, 1995). There was a recognition that:

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[74] Dr Rosenak, M. Reflection on my visit to Johannesburg on behalf of the SA Board of Jewish Education. Unpublished document, June 1982.
[75] Dr Jonathan Cohen – Report to the South African Board of Jewish Education, 1994.

> We [the Jews in South Africa] pay a price for raising our children isolated and insulated from other racial and cultural groups. The fragmentation of the apartheid years is now in transition into a multicultural, multilingual, and multiracial society. Our children, like our community, remained cocooned, with little stimulus or opportunity to learn to relate to others. It is our educational responsibility to compensate for this and to construct opportunities for them to grow and realise that a strong Jewish identity is a solid foundation from which to look outwards with tolerance, understanding, compassion and commitment (Rubenstein, 1999:75).

Historically, the admission of non-Jewish pupils was a relatively minor issue for the KD schools, mainly because there were not many applications of this sort. The Orthodox and Ultra Orthodox Jewish schools have a clear policy of accepting only those who comply with their religious standards (Yeshiva College does, however, accept non-observant Jewish pupils). The KD schools, as well as the other mainstream Jewish day schools in Cape Town did not have that type of policy. These schools were open to gentile applicants, subject to the requirement of compliance with Hebrew Studies and other Judaic aspects of the schools, as well as non-eligibility for fee subsidies.[76] The schools made no distinction between the statutory racial groups as defined by apartheid legislation. However, in the Transvaal, special permission was required before black pupils could be accepted. In 1985 the Board's application to admit 10 black pupils was rejected by the Provincial Education Department. The Board could not take a clear stand on the issue. On the one hand, some Catholic schools admitted black pupils even without permission, and on the other hand the Board's executives were not ready to defy the authorities. Besides, there was always the fear that accepting a significant number of gentile pupils would compromise the Jewish ethos of the schools. The option of restricting admittance of gentiles by using a quota was unappealing to Jews who were historically the victims of quota systems. When in 1986 the Transvaal Provincial Education Department conditioned that subsidies would only be granted to schools that complied with the regulations debarring blacks or allowing only a certain quota to attend, the Board pursued a moral stand and declined the subsidies. This stipulation was, however, withdrawn in 1987 and 10 black pupils were admitted to the KD schools (Shimoni, 2003).[77] The admittance of gentile students was not constitutionalised but rather left to the discretion of the Board. There was, however, an implicit unofficial policy that while the children of gentile employees at the schools and the siblings of gentile pupils already in the system would be viewed sympathetically, all other gentile enrolment

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[76] The Herzlia schools in Cape Town are still open to non-Jewish pupils. In 2000 they had 60 non-Jewish pupils out of 1700. Minutes of the executive committee meeting, 8 August 2000.
[77] The only source for this narrative is Shimoni (2003) who was quoting from the minutes of the executive committee meetings of the SABJE.

would be discouraged. As it happened there were more gentile students at the VP campus than at the other campuses, but their number was still relatively small.[78] In May 1990 the Board decided that leaving the decision to the discretion of the chairman and director was unsatisfactory and that in future no gentile pupils would be accepted. Those who were already in the schools and their siblings were not affected. According to Shimoni this resolution was predicated on the conviction that KD parents have the right, like any other religious community, to educate their children in their own private schools and that this approach is compatible with the democratic and culturally pluralistic principles of the much anticipated new South Africa. By 1998 there were about 18 gentile children at the VP campus and their number was declining.[79]

A study by an ex-principal of Carmel school in Durban (Workman, 1997) explores the attitudes of the Jewish community towards opening the schools to non-Jewish pupils. A decision was made in 1994 to fill the Jewish day school to capacity with gentile students. At the time of the investigation Carmel College had an almost 50% gentile population and had therefore implemented a multicultural education programme which Workman regarded as being counterproductive to the goals of Jewish education. Jewish Studies teachers complained of feeling inhibited in their classes because they were sensitive to the feelings of the gentile children, while parents did not seem to be aware of the problems of teaching Judaism in a multicultural environment. Parents would have liked the proportion of Jewish to non-Jewish student enrolment to be monitored, yet they believed that children needed to learn to mix with other cultures and to learn tolerance and understanding. Workman argues that opening the school to gentile pupils had the potential for cultural discord and lack of unity within the school as well as assimilation. He maintains that there was little provision at the school for multiculturalism and as a result gentile students were recipients of a curriculum that lacked relevance and was foreign to their needs.

The debate about opening the schools to non-Jews was raised again at the Board when a VP parent, who was also a member of the PTA at the primary school, became an honorary officer in April 2000 with the sole purpose to debate this issue.[80] The parent was an ex-KD pupil, a member of the Reform movement and had been an anti-apartheid activist. The issue was raised at an executive committee meeting in August 2000. The parent suggested opening the KDVP campus to gentile pupils for financial and political

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[78] There was big intake of Japanese pupils into VP in the 1980s.
[79] David Saks's interview with the Board's financial director, 1998.
[80] Minutes of the SABJE executive committee meeting, 16 May 2000.

reasons. Financially, he expected VP to become more viable and thus able to compete with other schools in the area. He reported that there was a circle of professional Jewish parents who did not send their children to the KD schools because of the exclusivity of admitting only Jewish children. There was an implicit notion that opening the schools to gentiles would also help families of "mixed" marriages that were sometimes denied access to the schools.[81] On political grounds, he argued that the notion of an exclusive school in the new South Africa was a political embarrassment. He is quoted in the minutes as saying that:

> He had been at KD for 12 years of his schooling at which time there had been some non-Jewish pupils in the school. It had been a liberal island with a liberal approach at that time as a challenge to authority during the apartheid era: then in 1994 when there had been democratic elections we changed the policy and closed the schools to non-Jews. This did not make sense to him and was a political embarrassment.[82]

None of the other participants on that executive committee was in favour of the suggestion, but they expressed a willingness to continue with the debate.

This debate was another example of the perennial conflict in Jewish education: that is, how to be democratic and Jewish at the same time; and how far the "borders" of the community schools could be broadened without losing their essence. Furthermore, the debate raised the crucial question of who has the power to decide what is inside and what is outside the borders of the community. This will be discussed later in this chapter.

Funding the Jewish community schools

Wertheimer (1999), writing about the American context, maintains that what all Jewish day schools have in common is ongoing financial worries. He identifies two main reasons for this: one, the dual curriculum that inevitably brings a number of added expenses, such as a longer school day and a larger teaching and administrative staff complement to teach both Jewish and general studies; and two, the commitment to provide subsidies to families unable to afford tuition fees.

The history of the Jewish day schools in Johannesburg reveals the same continuous struggle to find resources to establish and maintain the schools. It was perceived that since the establishment and subsequent expansion of the schools, the Board had *'drifted into a state of chronic financial crisis, interrupted now and then by an urgent appeal to the community'* (Katz 1980:434).

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[81] A child is considered Jewish when born to a Jewish mother. Problems are created when only the father is Jewish.
[82] Minutes of the SABJE executive committee meeting, 8 August 2000.

The question was who should fund Jewish education. The main income sources for the schools were fees, private donations and community funds. In 1960 the Board set up a commission under the chairmanship of Mr Justice S M Kuper to investigate ways of funding the Board's activities (Katz, 1980). The Kuper Commission recommended that both the South African Jewish Board of Deputies and the South African Zionist Federation (SAZF) should provide direct assistance to the Board of Education. The paradox in those years was that the community collected huge funds for the welfare of Israel while its needs went unfulfilled. For the Zionist leaders in South Africa, Israel's needs were greater than the needs of the mostly affluent local Jewish community. The winning argument was that Hebrew education is a Zionist duty and the schools were therefore entitled to receive funds from the Israel United Appeal (IUA), the funding arm of the Zionist movement. The SAZF agreed to assist only the national activities of the Board. However, the SAZF began dedicating some funds for Jewish education in 1974. This figure peaked at R1 million in the late 1970s, but then declined to R500,000 in 1982 (Shimoni, 2003).

In 1978, the Board announced a financial crisis with total liabilities of R5.5 million and a yearly deficit of R1.3 million. It was claimed that these deficits were caused by subsidies that were estimated at 20% of income (Shimoni, 2003). Moreover, the KD schools had lost a total of 288 pupils in 1977 (about eight percent of their enrolment) to emigration and "cram" colleges (Eden and Damelin). Staff was cut back (note that 75%–85% of the Board's expenditure went to teachers' salaries), but this saving was almost entirely wiped out by the losses incurred owing to the sudden drop in enrolment (Katz, 1980:610).

By 1985 the crisis was even greater.[83] The Board's chairman warned that unless a target of R20 million was reached within a few months, the schools under its control would be closed or would drastically limit their intake. Community leaders launched a "debenture campaign" by which funds were raised either by outright donations or pledges that provided interest-free loans over a ten-year period in return for debentures underwritten by the Standard Bank of South Africa.[84] Only R13 million was collected,[85] but many of the contributors voluntarily wrote off the money owed to them, and the collapse of the Board was thus averted for the time being (Shimoni, 2003).

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[83] Jewish education crisis is far from over. *Zionist Record and SA Jewish Chronicle*, 1 February 1985.
[84] Defunct bonus bonds may save day schools. *The Jewish Herald*, 5 March 1985.
[85] Jewish schools still need R7 million. *The Star*, 1 August 1985.

The financial crisis seemed to cause a rift in the community. The Board was accused of mismanaging funds, but it maintained that the crisis was due to school fees not keeping up with increases in teachers' salaries, high inflation as well as the higher interest rates charged by the banks.[86] Some parents refused to contribute unless the present management committee was changed. The parents of Reform pupils maintained that the committee had no compunction in asking them for money while not allowing Reform rabbis to participate in any way at the schools.[87] Community leaders, however, stood firmly behind the Board and accusations of a split in the community were denied.[88]

Some relief was obtained when the South African government in 1986 introduced graded subsidies to private schools based on the cost to the state of educating pupils at public schools.[89] The first government grant was received in February 1987, though the amount was disappointing.[90] Nevertheless, by 1990 the financial situation of the Board was stabilised. The chairman announced that fees in the previous year had amounted to R25 million; the United Communal Fund (IUA/UCF),[91] the government grant and other fundraising activities had contributed R5 million each (Shimoni, 2003).

While Jewish education found itself for the first time in stable conditions, the transitional context in South Africa at the beginning of the 1990s was working against it. As was mentioned before, increased emigration caused the KD schools to lose pupils and income. The loss in numbers was mostly offset by the flight of many Jewish pupils from government schools into private education. However, the loss in income was irreversible, especially since the families that had left the country were mostly those who could afford to pay full fees. Moreover, the perceived success of private profit-making schools like Crawford College attracted a significant number of families who could afford paying full fees.

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[86] SA Jewish board hits back in education cash row. *Sunday Express*, 3 March 1985; Facts behind the R10m school crisis. *The Jewish Herald*, 26 March 1985.

[87] Jews split by row over schools fund drive. *Sunday Express*, 24 February 1985.

[88] No community split, says Board. *Jewish Times*, 8 March 1985.

[89] The De Lange Committee's Report (1981) shifted government's attitude towards independent schools from animosity to one of grudging acceptance, especially as these schools were seen as useful "pressure valves" to cater for, and marginalise, troublesome pupils and non-racial tendencies. In keeping with this utilitarian attitude, the Private Schools Act of 1986 introduced compulsory registration for private schools, as well as subsidies for many schools at a 15% to 45% level (Hofmeyr & Lee, 2002).

[90] Govt plans subsidies for private schools. *The Star*, 24 May 1985. Subsidies expected for Jewish schools. *Jewish Times*, 27 September 1985.

[91] In 1986 the IUA (Israel United Appeal, the funding arm of the Zionist organisation) merged with the UCF (the United Communal Fund). Subsequently, it was managed under the Board of Deputies. This resulted in a further decline of the Zionist Federation in South Africa.

The tacit assumption that the community (mostly through the UCF/IUA) should fund the schools was also reversed in the 1990s. There was an implicit new expectation that the Board would raise its own funds to support needy students and specialised programmes.[92] At the end of 1996 a special King David Schools' Foundation was created to cater for needy students. There was, however, a subsidy shortfall, which affected a handful of families who decided to leave the system. In 1996 the Board had to reduce its fee assistance programme from R10 million to R5 million. The hostel was closed, the pedagogic centre allocation was reduced and some teachers were retrenched.[93] The government still provided some subsidies, but these were gradually cut back.[94]

In 1998 the Board was beginning to face major financial challenges, though there was no perception of crisis.[95] However, by 2000 the debt was growing and a feeling of *'gloom and doom'* had spread among the school community.[96] A process of restructuring was started whereby there would be a reduction of 85 staff across the board by the end of March 2001.[97] This restructuring seemed, however, to be too slow as there was *'a very clear commitment not to disrupt the schools … and to try and keep [education for the children] intact and wherever possible, to try and reduce the auxiliary things, but to try and keep teachers in classrooms teaching happily'.*[98] By the end of December 2000 the closing overdraft of the Board was R19.5 million.[99] It was announced that the banks were unwilling to continue with that level of debt, and that the Board could not afford to service the overdraft anymore. Crucially, the community withheld its support. By the beginning of 2001 it was announced that a financial crisis had hit the schools and *'subsidy cuts force[d] pupils to leave [the schools] for the first time in 50 years'.*[100]

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[92] David Saks's interview with the director of the SABJE, 1998.

[93] King David to peg fees for 97. *The SA Jewish Times*, 21 February 1997.

[94] The National Norms and Standards for School Funding of 1998 (NNSSF) provided the criteria of eligibility for subsidy, and the principles of allocation. It outlined a sliding scale of state subsidies, whereby the poorest independent schools would receive the most state funding and the best resourced schools would obtain no subsidy at all. Schools with the lowest fees received 60% per capita of the average expenditure by the province on a public school learner. No subsidy has been paid to independent schools, such as KD, whose fees are more than 2.5 times the average provincial per capita expenditure at public schools (NNSSF section 151).

[95] David Saks's interview with the financial director, SABJE, 1998.

[96] Minutes of the executive committee meeting, 6 February 2001.

[97] Minutes of the executive committee meeting, 20 June 2000. See also minutes of the Employee Forum meetings held between 19 June 2000 and 12 February 2001, at which negotiations were taking place.

[98] Other stakeholder, 10 January 2001. [Document 7:122 (380:394). Codes: Previous restructuring].

[99] Minutes of the executive committee meeting, 6 February 2001. The annual financial statement for the year ended 31 December 2001, indicated that the overdraft was actually R23,709,309.

[100] Money crisis hits KDS. *SA Jewish Report*, 26 January 2001.

Stakeholders started to ponder where the money had gone. Speculation was rife that some members of the Board had used school funds for personal gain, that there was gross mismanagement and that the Board granted subsidies whimsically. A closer look at the data, however, suggests a more complex set of factors:[101]

Dwindling number of pupils

The constant drop in the number of pupils at the KD schools did not always translate into a reduction in the running costs of the schools (Rubenstein, 1999). As the following excerpt demonstrates, rational thinking was not always the answer:

> You know, when you are losing 100–200 kids a year that adds up to a lot of revenue. And you know the problem here – in an ideal world, in 1999 only children in Grade 7 would emigrate. And in 2000, children in Grade 5 would emigrate. But it doesn't work like that. You know, it's across the whole system. So one can't be as responsive to changes as ideally one should be. You can't just say there are 10% less children – let's cut 10% of the teachers.[102]

Pupil:teacher ratio

Keeping the pupil:teacher ratio in line depended on the vigilance of the lay leaders (the chairperson and the financial committee), the professional officers and the principals. An ex-chairperson suggested that keeping this ratio under control was one of his main concerns:

> I know that every single month, when I was Chairman of the Board, there had to be a pupil:teacher ratio report. And I used to say, 'it's out – I don't care how – I want it back to where it has to be'. And there used to be complaints: teachers are sick, teachers are on leave … etc. I said, 'not interested – that's the situation'… It's a management situation. … You have to have a certain mark-up if you sell goods. You have to have a certain pupil:teacher ratio to balance your income with your expenditure.[103]

Another ex-chairperson described the constant fight to keep the pupil:teacher ratio at 14:1.

> We used to cut it to what we thought was 14, and we used to find it was 13.1. The next time we checked it, it was 12.8. But we were always aiming at that target [14:1]. And always checking.[104]

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[101] The following analysis is based on my knowledge of the system; on the minutes of the executive committee meetings and my participation at these meetings from January 1999 to April 2001; on the interviews I conducted for the research and on secondary analysis of previous interviews with Board members; on the report by Brian Isaacson in *Aligned Leadership* (22 March 2001), titled 'South African Board of Jewish Education – Re-positioning, Review and Recommendations', Unpublished printed copy of slides; on recorded consultations with the CEO; and on written suggestions for cost-cutting measures given by the administrative director, the financial director and the human resources officer to the CEO (May 2001).
[102] Manco member, 5 August 2002. [Document 16:45 (122:145). Codes: Reason - depleting numbers].
[103] Community leader, 8 May 2002. [Document 10:31 (390:393). Codes: Reason - pupil:teacher ratio].
[104] Other stakeholder, 28 October 2002. [Document 30:13 (552:577). Codes: Chairman - role; Reason - pupil:teacher ratio].

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It was the duty of the director to ensure that a viable ratio was maintained, and to provide a reasonable explanation or solution when this ratio was too high. The director in turn depended on the principals to adhere to the ratio. It seemed, however, that there was not enough control and that the goals of efficiency were often compromised by ideological, social and educational imperatives:

> And to the best of our ability we did try and control it. I think we did … because the headmasters will do what is convenient for them. You could not know everything that is happening at the schools at Board level. … there always has to be some fat; we gave more fat to the Hebrew Department than we did to anything else, because we were there and it was important to us … I think that [the principals] need a bit of fat. It's just a question of where you allow it. So … as a director, you know 85% of what's going on in the school. The principals should know 100%, and they drag, of course they drag, but it is OK. But when it reaches a stage where there are just too many, then things fall apart. It implodes … if you are paying so many salaries and you haven't got the numbers to support it.[105]

The schools advocated an ethos of care and integrated curriculum; class teaching was the preferred mode of delivery at the primary schools while subject teaching was only introduced in Grade 7. Moreover, small remedial classes in secular and Hebrew Studies provided more individualised instruction. All these contributed to the maintenance of an unfavourable pupil:teacher ratio at the schools.

It seemed that a viable pupil:teacher ratio could be achieved if there was less emphasis on individual needs, if there was cooperation between the schools and the Board and if lay leaders constantly monitored the situation and asked the right questions. Towards 2000 it seemed that control over the pupil:teacher ratio had been lost and the ratio was reported to be standing at just under 9:1.[106]

Increased demand for fee assistance and the non-payment of fees

The schools were obligated to accept children regardless of financial or educational ability. As discussed before, special provisions were made but those were not always sufficient. The Board had supplemented the shortfall as well as administrated the subsidies. So for example in 1999, R1.5 million out of the R8 million in subsidised fees came out of the budget.[107] In 2000, R7 million was budgeted for, but R13 million was in fact used for subsidies.[108] It was perceived that some of the shortfall was created because the Board used

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[105] Other stakeholder, 15 July 2002. [Document 25:23 (582:628). Codes: Reason - pupil:teacher ratio].
[106] New CEO for SABJE. *Davidian Star*, July 2001. In 2000 the average pupil:teacher ratio at public schools in South Africa was 33.4 and at independent schools, 17.1. (Source: Education Statistics in South Africa at a glance in 2000, Department of Education, 2002.)
[107] Minutes of an executive committee meeting, 26 October 1999.
[108] Minutes of an executive committee meeting, 12 September 2000.

– in addition to the formal procedure of estimating the needs of the recipients of the subsidies – another informal system based on the close relationships among the members of the community:

> …and then Chaim would bump into [a past financial director] and said: 'Look I've gone *mechulla* (bankrupt) and he [the past financial director] would say, '*Oi Gevalt* (Oy, how terrible), don't worry about the school fees'… [And] I'm sure in many of those cases, it was justified … [but] how would he [the financial director] investigate? So he would phone his friend Marti, and say, 'Marti, has Chaim gone *mechulla*?' and Marti would say 'Yes'. And that's the way the deficit grew … .[109]

The flight from public schools after 1994 and economic recession in the 1990s brought into the system more pupils whose parents could not afford the fees. Parents reneged on arrangements that were made. Staff members who telephoned parents to try and bring in fees were often subjected to verbal abuse. Cheques were returned; credit cards payments were rejected.[110] According to Jewish law, the Board could not charge interest on overdue accounts. This was seen to be another reason why parents were not too concerned about late payments.

With the appointment of a new financial director in September 1999, attempts were made to restrict the subsidies to match the level of donations. A matrix was designed to assess the level of subsidy. This, however, did not achieve the desired outcomes and a perceived gap between theory and reality was noted.[111] Moreover, attempts to enforce strong discipline on subsidies or fee payments were usually challenged by emotive pleas from the executives such as *'it would be tragic if even one child had to leave'* or *'it was a heartbreaking situation for Jewish pupils to have to leave the Jewish day school'*.[112]

The withdrawal of the government grant

The complete withdrawal of the government grant in 2000 resulted in an income cut of R6–7 million per year.[113] The government grant was used to cover the running deficit, even though it was not meant to do so, and in a way it became *'a sword of Damocles over the head of the Board because when it … was withdrawn, all of a sudden you had this huge*

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[109] Other stakeholder, 10 January 2002. [Document 7:52 (1090:1103). Codes: Reason - subsidies].

[110] Minutes of the executive committee meetings throughout 2000 repeatedly described the difficulties in getting parents to pay their fees.

[111] Minutes of an executive committee meeting, 27 September 2000. In the minutes from the 21 November 2000, it was reported that the Board had received 2000 calls in 10 days (many of them repeats) from parents and others pleading their case regarding the assessments.

[112] Minutes of an executive committee meeting, 21 November 2000.

[113] Gloomy financial picture of the plight of Jewish day schools painted. *SA Jewish Report*, 18 August 2000.

hole in your budget, and the structure could no longer be sustained'.[114] At the same time additional expenses, such as the Education Development Programme[115] and the government legislated Skills Development Levy, burdened the Board with further financial commitments. Security was also a significant expense as the Board had to face two main threats: one from growing crime in Johannesburg; and another from being a Jewish school in an era when Jewish institutions had been threatened or attacked in Israel and in other countries.

Competitive school fees

The level at which school fees were set was a delicate issue. There was ongoing debate as to whether the schools should charge market-related prices and have more subsidised students, or if they should lower their prices, thereby making it easier for more pupils to pay the fees. It seems that the Board was reluctant to increase fees.[116] KD school fees were lower than those at all the other Jewish schools and at most of the private schools in the area, with one or two exceptions. Notwithstanding the fact that lower fees were attractive to prospective parents, it has also been argued that the honorary officers on the executive, whose role it was to agree on the fees, were mostly parents who were reluctant to agree on a price increase that might impact on their financial situation.[117] Thus the two large fee increases of 20% and 11% in 2000 and 2001 respectively, increased the tension that existed between the honorary and the professional officers, and more generally between parents and the Board.[118]

Competition with other schools

Being private, the Jewish community schools stand in a market relationship with the parent clientele. As private suppliers of education, schools are vulnerable to the preferences of parents as consumers. Moreover, they must continue to offer a considerable range of activities in order to compete with other private schools that offer a wide variety of choices and modern facilities. For example, matric subjects with limited appeal, such as French and Drama, were maintained. Specialist Art, Music and Drama teachers were employed at each primary school. Information Technology (IT) and computer systems needed to be

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[114] Honorary officer, 13 August 2002. [Document 45:4 (165:169). Codes: Reason - government grant].

[115] EDP – outreach programme for less advantaged black schools. In 2000, transport costs for the EDP alone was R281,000. Minutes of an executive committee meeting, 4 April 2000.

[116] Gloomy financial picture of the plight of Jewish day schools painted. *SA Jewish Report*, 18 August 2000.

[117] Other stakeholder, 12 February 2003. [Document 61:3 (54:71). Codes: Reason - school fees].

[118] Minutes of an executive committee meeting, 27 September 2000.

constantly upgraded. Small Hebrew classes were created to allow all pupils to learn the language at their level of proficiency and Grade 0 classes were added when the government introduced the new school entry age of seven years.[119]

Teachers' remuneration

The schools consisted of mostly loyal, long-serving teachers; some of them were ex-pupils, and most had educated their children within the system. In direct relation to the time served by the dedicated, though aging, population of teachers and administrators, their salaries were relatively high. In addition, teachers were granted various perks, like a 50% fee subsidy for their children, medical aid, pension and a long leave. The long leave comprised 12 paid days a year, which the teachers could accumulate.

It is evident that teachers in a small system such as the Jewish community schools cannot advance much in their careers. In order, therefore, to acknowledge certain exceptional teachers, a disproportionately large middle management tier was created consisting of heads of departments, deputies and vice principals. Moreover, over a long period of time, stakeholders in academic and managerial positions negotiated themselves into all sorts of arrangements, some money-wise and some related to timetables. This all depended on their personalities, their relationship with management, their bargaining skills, their social or financial position and their perceived worth to the system. So, for example, a number of teachers worked on a part-time basis, while some were working more hours than others. Some teachers were paid for extra hours, while others were not. Some teachers took extra-mural activities and helped children free of charge, while others only gave extra lessons for a fee paid by the Board or the parents. As there was a dearth of Hebrew, Jewish Studies, Science and Maths teachers, those working in the system could negotiate favourable conditions. Principals taught very little or not at all. At times, even a deputy did not have a teaching load. Sick or bereaved members of staff were granted special consideration and the Board was reluctant to retrench or pension off widows or single women who relied heavily on their salaries. It was argued that these people would be a burden to the community anyhow, so they should rather work and earn a salary. This sometimes created paradoxical situations whereby their salaries were higher than those of the more productive staff members. Moreover, in some cases teachers negotiated conditions directly with the director, bypassing principals and thereby escalating conflicts

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[119] *Government Gazette* notice 647/2000, 18 February 2000.

between the schools and the Board. Another expense was created by the tendency of the Board to give retired directors or principals "a golden parachute" when they left their positions; they were sometimes kept on the same salary scale or conditions but in a lesser capacity until their retirement. In another case, an attempt by the Board to retrench a rabbi whose job was perceived as redundant was negated by the threat of an appeal to the Jewish High Court, who viewed unfavourably any changes in rabbis' working conditions. All these factors had created the situation of an over-staffed Board and schools, with no parity in salaries or conditions of employment; and a management that was aware of the situation but was unable to put an end to it.[120]

It is important to note that while this situation had created a nonviable system, it gave certain stakeholders the feeling that they were cared for. The following quotation illustrates this perception as the informant was unsure whether the financial deficit was caused by mismanagement or because the system was just too compassionate:

> It was total mismanagement, I think things were done – it wasn't run as a business, it was much more compassionate and much more caring in those days, I think. People like the [previous director] nurtured everybody and there was that kind of feeling of, this is your family and you belong here, and you felt quite secure and comfortable. For me personally, every time I asked for something it was always given to me without any consideration of the financial results; and when I think back on how much money was really wasted – there was no limit.[121]

Emphasis on professional development

The past directors of the Board, who were educators themselves, saw professional development as vital for quality Jewish and general education and continued to invest in professional development despite the growing financial deficit. Some programmes were sourced overseas and were relatively expensive, especially with the devalued rand. When Jewish Studies became a matric subject, the director invested considerable sums in developing the Jewish Studies teachers and curriculum, while attempting to keep the same level of investment in the Hebrew teachers and curriculum. There was also investment in the development of lay and professional leadership, the absence of which was of great concern to the director.[122] There was no agreement between stakeholders whether the investments were necessary, whether the programmes were beneficial or whether the best-

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[120] Honorary officer, 13 August 2002. [Document 45:4 (150:180). Codes: Reason - government grant; Reason - the system structure].

[121] Manager, 25 June 2002. [Document 17:15 (496:502). Codes: Reason - the system was too compassionate].

[122] Rabbi I. Rubenstein, Plan for the development of education in the controlled schools of the South African Board of Jewish Education, 1997–2000.

suited educators attended them. Some teachers who were selected to be sent on an expensive leadership programme in Israel felt that, on their return, their progress was blocked by managers who were neither consulted nor agreed with the director's choice of candidates. Even at the height of the severe financial crisis in 2000, the Board spent R998,392 on professional development.[123]

Remedial and social services

As the schools offer remedial services, a great number of parents whose children had learning disabilities wanted their children to attend the schools, even when it was clear that academically or socially it would be a disadvantage to them. It was perceived that as a direct result of the marketing campaign in the early 1990s and the flight from public schools, the number of children with learning difficulties grew. Notwithstanding parents' wish to keep their children in a Jewish environment they were also attracted by the absence of stigma in attending a regular school as opposed to a remedial school. Moreover, the subsidy programme that the schools offered was not available at ordinary remedial schools.[124] Though information on subsidies was confidential, certain remedial teachers observed that a great number of children in the remedial programme came from broken homes and poor households. Additional social services, such as psychological assessments and consultations, were also funded by the Board. A situation therefore emerged whereby an expensive programme was set up in order to care for the needs of the less well-to-do members of the community.

The structure and function of the Board

The legacy of the Board was that of a national body responsible for all South African Jewish schools. However, as discussed earlier, that was hardly the case in the late 1990s, although the Board carried some expenses of a national body, such as organising the conference on Jewish Education. It was argued that the management structure was not necessary for a normal day school system such as KD. There was a growing perception that it would be more efficient for each school to become an independent body, managing its own expenses. On the other hand, there were those who believed that some functions should be centralised. The following quotation exemplifies the uncertainty as to whether the Board structure was necessary or redundant:

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[123] *South African Board of Jewish Education, Annual Financial Statements,* 31 December 2000.
[124] Minutes of an executive committee meeting, 26 January 1999.

> Some people saw it [the Board] as top heavy – as a huge bureaucracy that didn't warrant its size in the comparative schools they were running … I didn't see for example why they needed an administrative director and an executive director. You know – I thought one would suffice … Okay the executive director took Jewish Studies under his control, which was fine. But you know, there was Hebrew, and Hebrew is an integral part of the school – I saw the need for that. I didn't see a need for so many of the other support systems for the administration of the schools. But in the areas like social – well not social services – but the Social Work Department – they needed a director. They needed it in Jewish Studies. But many of the other things – you know, I didn't have an opinion. So there I thought there was need for change.[125]

The informant failed to name any other departments that needed to be changed except for the general studies department. Stakeholders' perceptions of the Board and their limited understanding of its functions undoubtedly influenced their perspectives of the restructuring, as will be demonstrated in chapters 5 and 6.

Reduced community support

Many of the schools' traditional benefactors had emigrated, causing the schools to lose much financial support. The remaining donors have had to support the growing needs of the community, such as the homes for the aged and the burial society, as well as the needs of other charitable organisations that support disadvantaged groups in South Africa. It was also perceived that the fluctuating equity market and the weak rand affected some donors who occasionally retracted their pledges. Moreover, as mentioned before, the fragmentation in the community exacerbates the financial crisis, as each organisation looks after itself leaving the communal institutions without adequate resources. Subsequently, the United Communal Fund (UCF) gradually reduced its contribution to the schools.[126] It was perceived that commitment to the schools had waned significantly, such that parents were reluctant to spend extra money to subsidise other children, as one informant lamented: *'There was never a problem because there was that holistic view and I think that's gone. I think people are very inward'.*[127]

Nevertheless, it was observed that there was significant new money in the community, and that the Board failed to enlist a new generation of benefactors.[128] The vice-chairperson, a significant fundraiser, approached the Chief Rabbi to host a cocktail party at which top donors in the community would be urged to rescue the schools from the looming

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[125] Other stakeholder, 12 July 2002. [Document 24:20 (498:528). Codes: Reason - the system structure].
[126] Gloomy financial picture of the plight of Jewish day schools painted. *SA Jewish Report*, 18 August 2000.
[127] Honorary officer, 22 July 2002. [Document 37:21 (215:217). Codes: Reason - community - financial support].
[128] Minutes of an executive committee meeting, 12 September 2000.

financial crisis.[129] This gathering scheduled to be held at the beginning of 2001 was, however, postponed until the Board got *'its house in order'*.[130]

One donor explained that he had lost confidence in both the lay and professional leadership:

> So when they came to me – when they approached me about the morass that they were in … we sat down with their leaders – [another donor] and myself – and they asked for help and we said to them: 'Look, you don't even know what you are asking us for. Your situation is so poor, that you have no idea where you are and where you are going, so how can we even respond to you? First get a handle on your condition – tell us what your business plan is, and then we will respond. How did this arise? How did it come to this state?'[131]

With the lack of communal support, the vice-chairperson approached her husband, who was a prominent donor, to personally secure a loan at a private bank so that the teachers could get their December (2000) salaries and bonuses.[132] By controlling the funding of the schools the vice-chairperson was effectively controlling the schools and could therefore impose her own solution to the crisis.

From the above analysis of the various factors for the financial crisis it is evident that the management of viable community schools is a complex enterprise, in which diverse needs have to be constantly balanced and managed. It seems that ideological, humanitarian, moral and personal concerns took precedence over managerial and economic considerations. Even though business people led the organisation, it was never expected that the schools should be managed like a business; rather, there seemed to be the notion that *'whatever we were doing – we were there to deliver education to children, and that must be the priority'*.[133]

With the years the system had become clumsy and complex and was not reacting fast enough to the changing conditions. Previous restructuring attempts had added various functionaries and departments, which did not disappear even when perceived as redundant. The community schools had difficulty applying strict control measures even when those were deemed necessary. The question is whether these problems are inherent to community schools with multiple goals, as well as private and public agendas, or whether it is clearly a management issue caused by mismanagement and by the bureau-professionals' inept

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[129] Minutes of an executive committee meeting, 6 February 2001

[130] Minutes of an executive committee meeting, 27 March 2001.

[131] Community leader, 18 July 2002. [Document 23:13 (269:297). Codes: Reason - community - financial support].

[132] Manco member, 20 August 2002. [Document 41:18 (521:532). Codes: Reason - banks pressure].

[133] Other stakeholder, 10 January 2002. [Document 7:122 (380:394). Codes: Previous restructuring].

understanding of business principles and their adaptation to the educational arena. The following quotation elaborates on this issue:

> You see, I can never work out whether – is the Board of Education financially mismanaged because of incompetence, or because people are trying to achieve certain goals? … I mean it's quite clear that there is appalling incompetence, but the kind of people who take these decisions, are sort of fancy businessmen. Presumably their companies don't collapse in the same way. They are not just doing this because they don't know how to run a financial organisation. You see, it can be all sorts of things. It can be wrong priorities, it can be an inability to see change coming, and it could be – benign neglect.[134]

The objective of the next section, therefore, is to open the "black box", that is, the Board, and to explore how decisions concerning the management of the schools were made and who was making them.

The Board

The Board is governed by its 1928 Constitution, which has been amended from time to time at the biannual conferences. The Board comprises representatives of the controlled and affiliated institutions who are entitled to vote or be nominated for the executive committee (Constitution, section 5). The latter controls and manages the Board (section 8.1).

The affiliated institutions include *'any school or other institution which wished to become a controlled or affiliated institution of the Board'* (section 15.1). Representation at conferences is given to institutions that represent both the national and the traditional aspects of the community such as:

- honorary officers and life honorary officers (section 16.5.6-7);
- the PTA of each controlled institution or affiliated school (one delegate for 100 pupils) (section 16.5.1);
- each synagogue (Orthodox) is represented by one delegate for each 100 members (but not more than six delegates in total);
- affiliated synagogues with fewer than 100 members are also entitled to one delegate;
- other Jewish organisations are represented by one delegate;
- the Zionist Federation and the South African Jewish Board of Deputies are represented by five delegates each (section 16.5.5).

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[134] Parent, 8 November 2002. [Document 32:16 (564:580). Codes: Reason - mismanagement].

The executive committee that is nominated by the delegates comprises honorary officers and professional officers (section 8.2). The chairman of the executive committee is the chairman of the Board (section 8.3). The executive committee appoints the director and any other professional officers *'as the executive committee may from time to time deem it expedient to appoint in order to further the objects of the Board'* (section 9.1). The honorary officers comprise the president, vice-president, chairman, vice-chairman, treasurer, assistant treasurer and 10 additional members. In addition there are honorary life presidents, honorary life vice-presidents and honorary vice-presidents. By the year 2000 there were 35 honorary and life honorary members on the executive committee. In practice the life honorary members are only involved in the conferences or special executive committee meetings. The decision-making process is the responsibility of the executive committee. Decisions are taken by a show of hands. Professional officers are excluded from the vote.

Since its inception and until the 1980s the Board could be fittingly described as the "South African Board of Jewish Education". However, by the 1990s there were only 14 Jewish day schools affiliated to the Board and nine of them were Ultra Orthodox schools that did not look up to the Board for any direction. It was soon realised that:

> The title South African Board of Jewish Education is a misnomer geographically, since it devotes most of its resources to the activities of Johannesburg schools, predominantly the King David Schools … .[135]

The change in the Jewish education milieu in the country forced the Board to redefine the role and the function that it should assume in the community, and what structure would meet the changing conditions. This was an issue that was revisited by most consultants and strategic planners.

Following the 1985 crisis, strategic planners recommended re-organising the Board and improving its efficiency as a decision-making body by introducing more full-time professional management. There was a suggestion to differentiate between national and regional issues of the Board, and to delegate more authority and accountability to the schools. The Board was urged to improve its image amongst pupils, parents and the Jewish community as well as to improve communication. The honorary officers were advised to devote their time to policy formulation and advisory functions, while allowing the

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[135] A Strategic Plan for the South African Board of Jewish Education, 1986–1990. Unpublished document dated December 1985.

professionals to manage the schools. The report signified a transition from honorary officers running the Board to bureau-professionalism.[136]

In 1993, in the run-up to the transition in South Africa, and with a drop of over 200 pupils in the enrolment figures for that year, the Board embarked on another strategic planning programme in which it reviewed the 1985 strategic plan. Questionnaires were sent to a wide spectrum of participants and meetings were conducted. It was perceived that some of the objectives of the 1985 strategic plan – specifically those related to the image of the Board and to its communication with other stakeholders – were not achieved. There was a perceived lack of understanding of how the system worked and knowledge of the people who made it work. The Board staff was perceived as being disinterested and aloof.[137] Following the strategic planning the Board embarked on an aggressive marketing drive (both for the schools and itself)[138] and established its own fundraising office (the KD Schools Foundation). Anticipating the changing educational context in South Africa, a decision was taken to broaden the remedial services that the schools provided and to incorporate pupils with special needs into the mainstream. Another decision was to embark on an outreach programme for black schools from disadvantaged areas in order to *'be seen to be active and committed to contributing to the remedying of educational inequalities in South Africa'*.[139]

Following the above decisions additional positions were created at the Board, such as coordinator of special needs (for Hebrew and secular studies), coordinator for gifted education and public relations officer. The latter two positions were terminated two years later. The role of the coordinator of special needs in Hebrew was incorporated into the role of coordinator of Hebrew Studies in 1998.

At the same time, there was a growing demand to split the national function of the Board from the day to day running of the KD schools.[140] It was then that the idea of devolving power from the hands of the Board to the schools began to take root, and the language of market-led restructuring emerged. The *'thinking has as its basis … that the closer you bring the source of the funds to the point at which they are spent, the more*

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[136] Ibid.

[137] SA Board of Jewish Education, Strategic Planning, 1993. Unpublished document, 21 July 1993.

[138] Aggressive campaign to market schools. *Zionist Record*, 15 September 1993.

[139] SA Board of Jewish Education, Strategic Planning, 1993. Unpublished document, 21 July 1993.

[140] As the representative body of all the Jewish schools in South Africa, the Board was authorised to coordinate policy and to speak on their behalf to other Jewish national bodies as well as with the government. It also organised a biannual conference. However, its main function was to channel the communal funds to the different schools. As the funds and the government grant had dried up by the 1990s, this function became almost irrelevant.

efficient use of the funds is obtained'.[141] Moreover, in 1998 a financial consultant was approached by an independent group of Jewish businessmen to conduct an independent survey into various Jewish organisations that were facing financial difficulties. He advised the Board that the schools should be *'a commercial place of business with its main business being education. The school must be financially self-sufficient and be controlled and managed by business people'*. He further recommended that *'membership of the Board be confined to those who qualified on the basis of the size of their donations'*.[142] The documents and minutes that were available to me failed to show any serious engagement with these managerial ideas.

In 2000, the looming financial crisis and the perceived lack of leadership in the organisation[143] (both professional[144] and lay), prompted a move towards further decentralisation and the empowerment of parents. It was envisaged that the national functions of the Board would be dealt with by representatives of all the Jewish day schools, while the governance of the KD schools would be addressed by a newly established management council – the King David Schools Management Committee (Mancom). This council aimed at bringing together relevant constituents of the schools, such as PTA chairpersons, principals, professional officers at the Board and only selected members of the executive.[145] However, a few months later, *'some executive members were unhappy as they saw deviation from their role and felt excluded from processes'*.[146] A decision was taken to disband the council and to revert to the status quo whereby the executive remained the highest decision-making body.

The leaning towards centralisation is in sync with the American trend whereby central agencies prospered in the late 1990s after turbulent times at the beginning of that decade. It was suggested that:

> If central agencies of Jewish education did not exist, they would have to be invented so that they could carry out both at present and into the next century the task of initiating, facilitating, coordinating and supporting the programmes which have as their focus the transmission of our Jewish heritage and securing meaningful Jewish survival (Lasday, 2001:19).

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[141] Unpublished and undated document (probably 1998/9) written by a Board member.

[142] Jewish education – an independent survey. *SA Jewish Report*, 3 July 1998.

[143] Rubenstein, Plan for the Development of Education in the Controlled Schools of the South African Board of Jewish Education, 1997–2000. Unpublished document.

[144] The director was on a five-year contract before his imminent *Aliya* (emigration) to Israel in mid-2002. The principal of the high school at Linksfield was due to retire at the end of 2001. Two of the primary school principals were close to retirement age.

[145] Minutes of an executive committee meeting, 16 May 2000.

[146] Minutes of an executive committee meeting, 6 February 2001.

However, it was also found in 2001 that central agencies still struggled with the challenge of status, and that the general Jewish community still lacked a solid understanding how central agencies contribute to education. It seems that while the community is aware of certain visible programmes delivered by boards of education, those are often mistaken for the totality of services that they offer to the community, therefore:

> Services such as community planning, teacher training, curriculum development and coordinating and convening of educational programmes are all important services that take place behind the scenes and so are invisible to the general community (Lasday, 2001:25).

The only act of the management council of the KD schools was a mini-conference that took place in October 2000, at which a wide range of stakeholders discussed the way forward. Considering the imminent financial crisis, a suggestion was made to engage the services of a consultant to address issues about the overall structure of the organisation and the relationships between the schools, the staff and the parents.[147] Thereafter a corporate consultant who had some minor experience with school governance was engaged. The choice of consultant was met with suspicion by some honorary officers. Ironically, it was the director who welcomed it, not realising that with this move he created the pretext for his own dismissal.

The consultant presented a *'compelling case for change'*.[148] His report advocated the idea that the schools *'should run as a business'* and that parents should be getting better value for money. The word *business* was underlined repeatedly, and the sentences in which it appeared were circled. Emphasis was also given to the words *'correct management' 'bold, credible initial steps for sustainable change'*, as well as to accountability and performance. The report concluded with three main recommendations: first, to devolve coordination and to outsource specialists; second, professional leadership, which should be based on the combination of an educationalist and a businessman, was critical; and third, to diminish lay involvement at Board level and to have a small, empowered executive.

The consultant, based on selected individual and focused group interviews, without any proper sampling procedure, quickly arrived at the conclusion that the director and the administrative director were the main reasons why things had gone so bad. Even before the report was concluded and without the knowledge of the executives, the vice-chairperson and the chairperson had identified whom they thought would be the right person to turn the

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[147] Minutes of the executive committee meeting, 21 November 2000.
[148] Brian Isaacson, Aligned Leadership (22 March 2001). *South African Board of Jewish Education – Re-positioning, Review and Recommendations,* Unpublished printed copy of slides.

financial situation around. By recommendation of *'an anonymous philanthropist'*[149] they approached the Jewish owner of the for-profit Eden Colleges and the founding director of Educor Limited at the time of its listing on the Johannesburg Stock Exchange.[150] The decision was supported by the Chief Rabbi and by some ex-chairpersons who were members of the executives. It seems that the ex-chairpersons endorsed the choice with heavy hearts:

> The financials were revealed very very explicitly, and it was obvious that something very dramatic had to be done … There were two or three meetings and there was a lot of resistance to [the CEO], because many of us had had experience with him – and were not very enamoured with him, quite honestly. But when one looked at the overall situation, [it] seemed to be the only short-term solution that was available … So eventually this group voted unanimously that they should go ahead with that. And why did they do it that way? *Because they were scared that if they took it the normal democratic way … and took it through the Board, it would create chaos, and there would be a lot of dissention and there would be a lot of wars and there would be a lot of difficulties – and all that would happen was that they would destabilise the whole community*. And I think in that they were correct. So they adopted this undemocratic way of doing it … They never even reported back to this steering committee. This committee has never met again, or had any further say.[151] (My emphasis.)

> It was a rubber-stamp job. All the ex-chairmen were called to a meeting and it was a *fait accompli* already. … And they [chairperson and vice-chairperson] went, I think, for the wrong advice. Advice was given to them – they saw it as a lifeline and they grabbed it with both hands instead of debating the issue … They might – they will save the school financially, but I'm not sure they are going to save Jewish education as it is or was.[152]

> So I think what happened … was probably a very necessary, if unfortunate – you know, if difficult or painful exercise – and it could only be done by bringing in an outsider – because everybody – internal – you know – it was very difficult … you know the people on a very personalised level. It's very difficult to change a structure when you are so intimately involved.[153]

A more critical view of the ex-chairpersons' consent was their assumed accountability for the financial crisis and their perceived guilt for "keeping a blind eye" on the situation, a topic that I will return to later.

The designated CEO had a reputation as a shrewd businessman who understands the business of education. On a personal level, the aforesaid was also known as being a *'harsh operator'*[154] – an attribute that was considered paramount in order to achieve the

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[149] Mammoth plan to save King David Schools has been put in place. *SA Jewish Report,* 1 June 2001.
[150] Profile of CEO. *Davidian Star*, July 2001.
[151] Honorary officer, 28 October 2002. [Document 30:4 (94:144). Codes: Process - employing CEO].
[152] Honorary officer, 8 May 2002. [Document 10:73 (539:549). Codes: Process - employing CEO].
[153] Honorary officer, 13 August 2002. [Document 45:2 (92:107). Codes: Process - employing CEO].
[154] Community leader, 18 July 2002. [Document 23:37 (752). Codes: CEO - Henchman].

extreme cost-cutting goals of the restructuring. Ideologically, he was involved with the *Yeshiva Maharsha* community and *Ohr Sameach*,[155] both *charedi*-type communities specialising in bringing young people back to authentic *Torah* Judaism,[156] and on the extreme right of the Jewish community schools. The director was told that he was no longer in charge of the organisation, and the restructuring of the KD schools (the focus of my inquiry) began in April 2001.

In summary, while the national functions of the Board were increasingly minimised, there was resistance from within the executive committees to decentralise the decision-making process and to share the governance of the community schools with the parents and the schools. In reality the executive committee had very little say in the running of the schools. Decisions were usually made by an informal management committee (Manco), comprising the chairperson, vice-chairperson, treasurer, director and other professional officers on the Board, while the members of the executive committee were *'faced with a* fait accompli *and asked to ratify the decisions [of the Management Committee]'*.[157] These frictions within the executive committee turned it into a weak, centralised structure incapable of managing the critical ideological and financial dilemmas that the organisation was facing. This was in sharp contrast to the financial crisis in 1985 when a strong lay leadership joined forces to rescue the Jewish day school system. The current restructuring began with manipulation, secrecy and rumours; with one person – the CEO – given a free hand in financial and educational matters. While his conditions of employment were not disclosed it was announced that he *'would only be remunerated if he turned the organisation from debit to profit',*[158] thereby connecting his performance pay bonus directly to the cost-cutting objectives of the restructuring. Open debate was curtailed in order to keep the perceived unity of the community, and the executive committee endorsed yet another uninformed decision.

This chapter provided the local and global contexts for the restructuring of the Jewish community schools. It shows that by the turn of the 20th century the schools were facing financial, ideological and managerial crises. It seems that the organisation was no longer in sync with its environment and was unable to balance the dichotomies inherent in its complex terrain. These dichotomies included the tension between being an exclusive

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[155] Profile of CEO. *Davidian Star*, July 2001.
[156] Jewish Identity. *Mitzvot Fact Sheet Series*, SABJE, July 2000.
[157] Minutes of the executive committee meeting, 21 November 2000.
[158] Minutes of the executive committee meeting, 24 April 2001.

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Jewish school in the new democratic South Africa; the tension created by the need to provide for a religiously diverse Jewish community while various factors were pulling the organisation towards the extreme "right"; and the tension between keeping an "island" of secular/Zionist ethos in a community that had moved towards either religious Zionism or non-Zionism. Moreover, with depleting financial and human resources there was very little energy and capacity to manage these tensions. For those who were managing the organisation it seemed as if control had been lost. The survival of the Jewish community schools became dependent on a managerial solution and its promise to rescue the organisation from chaos. Subsequently, the lay leaders chose a "saviour" to sort out the schools' complex ideological and economic problems, unwittingly shaping the future of the Jewish community in South Africa.

The backdrop to all these conflicts and tensions was the uncertainties and fears experienced by the Jewish community in the face of local and global changes. I therefore end this chapter by highlighting the political, social and economic forces in the community at the beginning of the 21st century, during which time the restructuring of the Jewish community schools took place.

The Jewish community in Johannesburg at the beginning of the 21st century

Emigration and crime were believed to be the two factors that impacted most on the community during this period. It is perceived that there is hardly a Jewish family who has not been affected by crime (Shimoni, 2003) or who does not have at least one member living abroad (Saks, 2003). Demographic shifts within Johannesburg led to the closing of some Jewish institutions and the opening of others, mostly in and around the eastern Johannesburg suburb of Glenhazel,[159] which became the centre for religious and communal activity. A cut in government subsidies resulted in a serious financial crisis for the homes for the aged and other institutions that cared for the needy. It was perceived that fragmentation in the community and the move towards right-wing orthodoxy, started a trend by which each group developed its own community structure and avoided contributing to the mainstream. On the other hand, the mainstream community was often called on to help the small fringe organisations when they ran into financial deficits.[160] The Chief Rabbi announced that the community is "haemorrhaging in the middle", leaving the

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[159] Glenhazel is in close proximity to King David Linksfield. That suburb and others surrounding it are currently referred to as "the bible belt" because of the high percentage of observant Jews and Jewish communal institutions in the area.

[160] Fragmentation exacerbates community financial crisis. *SA Jewish Report,* 23 March 2001.

elders in the care of the community[161] and urged Jews to stay in South Africa.[162] Security concerns were put high on the agenda. Moreover, the global world was on the brink of recession; stock markets started to plummet and the boom in the information technology sector seemed to have come to an end. All this impacted negatively on middle-class Jewish households in South Africa. Consequently, *'a profound despondency had overtaken the community due to emigration, crime, economic hardship, and a diminishing donor base for essential welfare and educational institutions'* (Shain, 2001:467).

Internationally, the *Intifada* was a constant reminder that peace in the Middle East was not forthcoming, and anti-Semitism had again reared its ugly head, especially in France and other European countries.[163] South African Jewry was the least affected, but there was an increase in the numbers of reported incidents of anti-Semitism, including offensive comments on radio talk shows, letters to the press, inflammatory caricatures, incidents of vandalism to Jewish property, the desecration of Jewish graves, denials of the Holocaust, etc.[164] Anti-Zionist sentiment, largely as a result of ongoing violence in the Middle East, has been blurred with traditional anti-Semitic rhetoric (Saks & Kopelowitz, 1999). Most notable was the World Conference Against Racism, which took place in Durban during September 2001 and became a forum for extreme anti-Israel and anti-Semitic demonstrations, mostly emanating from elements within sections of the Muslim community (Saks, 2002; 2003). Moreover, as a response to globalisation and modernisation there has been a resurgence of Islamic consciousness and fundamentalist groups, coupled with a great sense of hostility towards Western democracies, Israel included. This has been described as "the clash of civilisations" and is expressed in the widespread violence around the world involving Muslims (Huntington, 2002). The media has begun to ponder Israel's fate. *Newsweek* dedicated a special issue to the question: "*The future of Israel – How will it survive?*" (1 April 2002). The acts of 9/11 invoked the United States' attack on Afghanistan and the Taliban in the search for Osama bin Laden. Later, in March 2003, the war on Iraq began. In South Africa many pro-Palestinian presenters and callers used radio talk shows to air unmonitored speeches, spreading rumours that Israel and the Jews were behind the 9/11 attacks,[165] and later on, the instigators of the war on Iraq. It has been perceived in the

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[161] Community 'haemorrhaging in the middle' could spell problem in long term. *SA Jewish Report,* 1–8 September 2000.

[162] Harris, C. Perform a Mitzvah, stay in SA. *Business Day*, 23 March 2000.

[163] Anti-Semitism, How bad is it? *Time,* 17 June 2002.

[164] Anti-Semitism low in SA. *SA Jewish Report*, 7–14 February 2003.

[165] Lies and conspiracy theories. *SA Jewish Report*, 22–29 November 2002.

community that the image of Israel in the media has changed from that of the "brave David" of the 1948–1967 era to the "brutal Goliath". There were talks about a global Jewish network, linking Israel and the United States, that aims to control the world. These perceptions and events have further intensified feelings of helplessness and frustration in the Jewish community in South Africa and provided the backdrop to the restructuring of the Jewish community schools.

Chapter 4

Methodology: Researching the community through emotions of change

The aim of the study is to describe, explain and theorise the restructuring of Jewish community schools in Johannesburg. It is argued here that economic, social and ideological forces have interacted in the process and have generated a conflicting set of discourses. The first is the discourse of new managerialism and marketisation, while the second is the discourse of community and religious resurgence. The methodology of this thesis is concerned with tracing the interaction between the above processes and assessing how they influenced the trajectory of the reform. This is explored by drawing out different stakeholders' views and the meanings they have attached to the changes, as well as by recalling their experiences and understandings *vis-à-vis* the restructuring process. Stakeholders' perceptions shed light on the three main research questions, namely: Why did the restructuring happen, how, and with what impact?

Research methodology

Researching a complex and current change process in real time – such as the restructuring of the Jewish community schools – presents many challenges and compromises. In this regard, a qualitative approach has been found to be well suited as it follows the process and explores the diversified perceptions, understandings, feelings and experiences of the different stakeholders. This is because *'qualitative researchers study things in their natural settings, attempting to make sense, or interpret, phenomena in terms of meanings people bring to them'* (Denzin & Lincolin, 1998:3). Denzin and Lincolin view the researcher as a *bricoleur* – a Jack-of-all-trades who uses any method, strategies or empirical materials that are available in the context to produce the *bricolage,* that is, a solution to the puzzle. In a qualitative case study, the researcher is the primary instrument for data collection, analysis and interpretation (Miles & Huberman, 1994).

I chose to use a qualitative case study research design for the following reasons: first, epistemologically, I accepted reality to be a subjective concept that needed to be interpreted rather than measured. Second, qualitative research encourages both inductive and deductive reasoning (Gilbert, 2001; Frankel & Devers, 2000). It therefore allowed me to test the concepts of new managerialism against the

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empirical data while accommodating the possibility that other theories might be at play. Third, as the field work for the study took place during a time of rapid changes and unforeseen developments, the flexibility of the design allowed me to follow a process, yet to be open to any surprises or sudden changes and to use the information gathered in the earlier research stages to alter subsequent stages; in other words, to "move with the goalposts" (Paechter, 2000). Fourth, a qualitative case study recognises different contexts and is recommended when it is impossible to separate a phenomenon from other variables in its context (Merrian, 1988). Fifth, a qualitative case study is guided by the ethic to remain loyal or true to the phenomena under investigation and is not confined to any particular set of methodological techniques or principles (Altheide & Johnson, 1998). Methodology thus *serves* rather than leads the research. And lastly, this research sought to account for the different stakeholders' experiences and to pose questions regarding meanings and interpretations. It was therefore important to have a flexible design that could accommodate this diversity. Moreover, qualitative research recognises that human beings have agency, that is, they react to situations including those of being researchers or research subjects. They therefore construct interpretations and meanings for the events in which they participate (Griffiths, 1998). In this sense the research makes an interpretation of the interpretation, which is referred to by Giddens (1984) as *double hermeneutics*. This means that any explanation of social life depends on both kinds of knowledge: knowledge of how people interpret their own experiences; and knowledge that researchers use to analyse and explain this behaviour.

The scope of the research

The data for this research was collected over a period of two years from 2001 to 2003. It began in April 2001 when a CEO was contracted to restructure the Jewish community schools and to solve their financial difficulties, and it ended in April 2003 after the 27th National Conference of the South African Board of Jewish Education (the Board), with the election of new honorary officers. However, in the year that followed – during which I was analysing the data and writing my dissertation – certain events and processes had reached their conclusion, thereby confirming or refuting some of the research findings. These subsequent events are therefore referred to in the dissertation.

I initially planned to limit the scope of the research, confining my purposive sample to the three primary schools that are controlled by the Board. I chose this sample because of my greater familiarity with this context and my belief that primary schools are less balkanised and therefore less complicated for research purposes. To a certain extent I stayed with this purposive sample, but my attention shifted to other sites to explore significant incidents or actions that took place at the high schools, the Board or in the broader community. I started to think of my research in terms of taking a panoramic view of the whole process, while zooming in to highlight certain events, individuals or processes. While researching an evolving process I did not know in advance which events would become significant. As a result I began by homing in on every occurrence. As the restructuring process developed, however, I was able to identify the more significant events and to focus on those.

Research participants

My research participants were the stakeholders in the Johannesburg Jewish community schools. Stakeholders' research supports my epistemological belief that there are many ways to view a phenomenon. However, it is also limited. In a stakeholders' research, the researcher ends up knowing less than any of the informants about their unique experiences, but the researcher does gain a unique overview of the total experience (Wallace & Pocklington, 2002). Thus, stakeholder-based research compromises depth for breadth.

Six main stakeholder groups were identified for the purpose of this study. These were teachers, parents, managers, Board members, community leaders and an additional group referred to as "other stakeholders". The latter group included various informants, from both inside and outside the community, who had some knowledge or interest in the restructuring of the Jewish community schools. The groups were not always distinct. A teacher could also be a parent; a Board member could be a community leader or a parent, etc.

Some groups included subgroups. For example, there were traditionally three separate teacher subgroups in the primary schools, namely, secular teachers, Hebrew teachers and Jewish Studies teachers. The restructuring affected each group in a different way.

The manager group was small and easily identifiable. I therefore included in that stakeholder group the principals, their deputies, the vice-principals and coordinators at Board level.

The Board included those members of the executive committee who had voting power.[1] They were often referred to as lay leaders or honorary officers. They consisted of those elected at each conference as well as life members. There were about 35 honorary officers at the time of the restructuring. Within this group, there was a distinctive informal subgroup, the management committee (Manco), comprising the chairperson, vice-chairperson, the treasurer and the CEO – the only professional. Table 1 describes the six stakeholder groups in table form:

Table 1 – Main stakeholder groups

Stakeholders Groups		Members
Primary school teachers	Secular and remedial	Any informant who teaches secular subjects (including managers).
	Hebrew	Any informant who teaches Hebrew (including managers).
	Jewish Studies	Any informant who teaches Jewish Studies (including managers).
Management		Principals (junior, primary and high schools), deputies, vice-principals, coordinators (system level).
Board	Honorary officers	Any informant who has a voting right on the Board (life members included).
	Manco	Management committee within the Board comprising the CEO, the chairperson, the vice-chairperson and treasurer.
Community leaders		Any informant who has/had a formal leadership role in the community.
Parents		Includes PTA members and any informant who has children at the schools.
Other stakeholders		Any informant who had knowledge about the restructuring or certain aspects of it, but was not included in the other categories. This category included rabbis, previous directors, high school teachers, scholars, consultants, social workers, donors, employee forum representatives, members of other schools or organisations in South Africa, and *shlichim* (emissaries) that is, informants sent from Israel to do a specific job, such as youth movement leaders or the Israeli Task Force.

A combination of purposive or judgemental sampling as well as snowball sampling was used to choose my informants. In purposive or judgemental sampling *'the researcher applies his/her experience and judgement to select cases which are representative or typical'* (Fogelman, 2002:101). I had to rely on my knowledge of the system in order to approach stakeholders who I assumed represented diverse views. Once I had approached these individuals and had interviewed them I asked

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[1] See Chapter 3 for a detailed description.

them to direct me to others with similar or different opinions, thus using a snowball sampling approach. To interview teachers, I identified a teacher with a specific role at each school as my first informant and then used snowball sampling to identify other teachers. I applied a similar reasoning to identify parents who had knowledge of the restructuring. I approached active parents with a specific role in the Parents'– Teachers' Association (PTA), and thereafter used snowball sampling to identify active parents with diverse views. I also tended to follow up on individuals who went from being passive stakeholders to active stakeholders. This included, for example, a newly promoted manager or a parent who became involved in the PTA in a significant way because of the restructuring. I soon accumulated a great number of names – in fact, more than I could follow up on. The choices and decisions with whom to talk to, and when, were made as the research progressed. Seventy-two (72) stakeholders were interviewed; few had more than one interview.

While I attempted to give voice to diverse stakeholders, a few perspectives are missing, such as the teachers and the administrators who were retrenched; this research focused on stakeholders who stayed throughout the life of the field study. The voices of the newly promoted administrators who took over the Board after the professional members were dismissed is also missing, since these people were reluctant to be interviewed. The school secretaries, who could have provided an interesting perspective, were excluded initially through oversight on my behalf, and later due to the need to narrow the scope of the research. The learners' voice is also missing, even though it is to some extent represented in the viewpoints of parents and teachers.

At the outset I decided not to approach pupils, but many of my interviewees repeatedly urged me to do so. I eventually conceded on an experimental basis and asked a mother to facilitate the process by suggesting that her child choose three friends for a small focus group. Parental permission was obtained. The children were 12–13 years old and in their last year of primary school, which was my purposive sample. This group was used to explore the type of information that could be gathered from pupils in order to decide whether they should constitute a separate group of stakeholders. While the data was most interesting and I was impressed with the depth of some of their remarks, I realised that the pupils often referred to events that had happened a few years before, such as the departure of a principal, as part of the

restructuring. I therefore decided not to interview learners and to limit the research to the six stakeholder groups mentioned above.

When quoting a stakeholder, I usually excluded attributes such as character description, religious affiliation, age, sex or whether the person was recently promoted. There was no attempt to assign causality or explanation of behaviour by the group that the interviewees belong to. I thought that it would be presumptuous to assume that selected biographical details can explain behaviour. An overlap between roles also existed; for example, one could not tell if a teacher's opinion related to the fact that she was a teacher, a mother, or because she knew a certain Board member.

Method for attaining access

The way in which I was to gain access had troubled me from the inception of the research. I began my PhD programme before the Jewish community schools' restructuring and with the support of the director at that time. I was interested in the new policy context in South Africa and how it had impacted on Jewish community schools as independent schools. With this vague idea I began by looking at various government policies, searching for a topic worthy of research. The restructuring of the schools, the appointment of a new CEO and my subsequent retrenchment provided me with an exciting research focus. When I notified the new CEO that I had chosen the restructuring as the focus of my PhD he was encouraging and even agreed to be interviewed. I assumed, in hindsight, that this was a tactic on his behalf to get me to leave as soon as possible and to accept a "voluntary" retrenchment. The chairman of the Board gave me the same reassurance. A few months later I sent both the CEO and the chairman formal letters requesting an interview and access to data. These were, however, refused. The CEO was *'not comfortable in taking any risk with an external party'.*[2] The chairman *'was not in a position to furnish [me] with the information, nor to grant [me] the interview [I] had requested'.*[3] This was not unexpected. Problems with access are common when one researches a process that is both controversial and contested (Walford, 1994). Their refusals made me even more determined to explore what was going on.

I began by approaching individual teachers and other stakeholders who were distant from the centre and had little contact with the CEO or the chairman. After a

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[2] Letter from the CEO, 11 April 2002.
[3] Letter from the chairman, 15 April 2002.

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number of interviews – and as I became more confident and encouraged by the positive response to my research – I approached those individuals who worked closely with and/or supported the CEO. Most granted me interviews. In addition, I followed the CEO to every public meeting and openly took minutes of the proceedings. I was never refused entry. However, I could not observe the schools, classrooms or the staff rooms during working hours and I could not use surveys or questionnaires. I had to approach the stakeholders on an individual basis. Eighty-one (81) stakeholders were contacted and only nine declined for various reasons. Significantly, of those who avoided interviews, the majority were involved with the financial aspects of the restructuring, such as bankers and donors as well as the newly promoted administrators on the Board.

Several factors served to facilitate access. The most important one was my personal relationship with many stakeholders, some of whom I knew through my long association with the schools and some through my connections in the community. Since I was previously in a prominent position, many stakeholders knew my name even if they did not know me personally. This undoubtedly facilitated my access to information. I also agree with feminist researchers who claim that being a woman helps to facilitate access (Deem, 1994a). Deem maintains that a woman researcher is seen to be less threatening than a male researcher because in a sexist society she will be regarded as being "harmless". Moreover, one's gender helps when it comes to researching other women who feel comfortable to chat to and open up to another female.

My access to the field study was further facilitated by my sense of entitlement as a member of the community to research the restructuring of the community schools, and by my conviction that I, as well as the rest of the community, had the right to know what was going on. Initially, I attended annual general meetings (AGMs) and PTA meetings as a parent, even though I was more interested in the events as a researcher. As I continued with my inquiry and was able to clarify my research aims, I relinquished my role as a parent and took full responsibility as a researcher by asking permission from the chairpersons of the meetings to observe and take minutes. Permission was always granted, but only one chairperson actually negotiated with the other participants first before granting such permission. Often the chairperson did not introduce me or even think it necessary for me to explain the purpose of my research. My role as a researcher therefore continued to be hidden

from the other participants. Slowly, my presence became habitual to those who noticed me. Even the CEO, who was not "comfortable" with the research, accepted my presence and sometimes came to chat to me after the meetings. Many school members and parents probably found my presence to be a natural occurrence, based on my long association with the institution. They often confused my past position as a parent/teacher/Board member, and my research interest. I was often asked whether I was still researching, if my children were still at the school or if I was still involved with the Board. I was usually not concerned with the accuracy of the perceptions and would say something noncommittal like *'yes, I am like part of the furniture ...'*. It is therefore safe to say that my access was facilitated by my feeling of entitlement to be there as well as by the stakeholders' acceptance of this entitlement. At the same time I had to guard against getting too involved. I was careful not to interfere or express an opinion and preferred rather to mingle with the crowd, listening and making casual conversation.

Most of the community leaders and managers that I approached were generous with their time. This supports the findings of Walford (1994) that researching the powerful is easier than expected, especially in local communities. Some stakeholders were at first reluctant to be interviewed. I managed, however, to get those interviews through sheer insistence and by not taking "no" for an answer. In a way, gaining access and obtaining information required a personality change on my behalf. From being a somewhat aloof and rather reserved person, I started telephoning people again and again, walking alone (sometimes uninvited) into meetings, networking, chatting and making casual conversation. I support Walford's (ibid) observation that the researcher needs to adopt many characteristics of a social climber, especially when researching "up" (researching those in power). My transformation was quite noticeable and those close to me often teased me about it.

Data collection plan
The research was managed in seven phases (see Table 2), some of which were conducted concurrently:

Table 2 – **Research schedule**

Phase	Research Activity	Time Frame
Pre-research phase	Searching for a theoretical framework and submitting a research proposal	February 2001–March 2002
Phase 1	Observation	April 2001–March 2003
Phase 2	Documentation analysis	April 2001–ongoing
Phase 3	First round of interviews	February 2002–December 2002
Phase 4	Coding and analysing data (using Atlas.ti)	November 2002–February 2003
Phase 5	Second round of interviews with selected stakeholders on selected topics	January 2003–April 2003
Phase 6	Re-reading the interviews and re-coding data (using Atlas.ti)	April 2003–May 2003
Phase 7	Writing up the research report	April 2003–March 2004

Pre-research phase – This comprised refining the theoretical framework in order to identify sets of propositions to be used for the interview guide and as the organisational basis for data analysis (see Appendix 1). However, a deeper understanding of the theoretical framework was achieved only at a later stage when I analysed the data and began to write the research report.

Phase 1 – Observation was on-going, whether as a participant when I was still working at the Board, as a parent attending my son's school AGM or PTA meetings, as a community member attending public meetings and conferences, or as a researcher attending various public and private meetings. My observations were recorded in my journal.

Phase 2 – Before beginning the interviews I read extensively about previous restructuring efforts in order to familiarise myself with the history of the institution. This reading, together with my personal experience, formed the basis of engagement with the interviewees. Document analysis continued throughout the research phases as data became available.

Phase 3 – The aim of the first round of interviews was to elicit interviewees' perceptions with regard to their roles before and after the restructuring, their relationships with colleagues and other stakeholders, and their understanding of why the restructuring had occurred, how it had evolved and with what impact. While the literature recommends an on-going analysis of the data in order to inform subsequent interviews, this was often impractical for two reasons. First, the number of interviews and their length delayed the transcription process and subsequently the analysis. Second, as I was emotionally involved in the research it was difficult for me to detach

myself from the data. I realised that I first needed to focus and feel the events as they occurred and to leave the analysis for a later stage. A similar approach to data analysis was taken by Thody (1997) who maintains that delaying analysis allowed her to be non-judgemental and detached.

Phase 4 – This phase constituted my first comprehensive data analysis. The data was generated from my personal account, documents and interviews. It was gathered and coded with the help of Atlas.ti – computer-assisted qualitative data analysis software. This analysis allowed me to form a theoretical understanding of the Jewish community schools' restructuring.

Phase 5 – On the basis of the findings, a second round of interviews was requested with selected respondents to assess their awareness of specific aspects of the restructuring, their willingness or ability to participate in the process, and the meaning they attached to their experiences. This gave some longitudinal perspective to the research. Sharing the emerging analysis with the participants incorporated "member check" into the research methodology and thus increased its credibility (see section on validity in this chapter).

Phase 6 – This phase comprised a second analysis of the findings. As my understanding of the process increased I began to theorise my findings and was able to move from the "small picture" to the "big picture". I started to read extensively on new emerging themes such as globalisation, identity and Jewish identity, secular and religious Zionism, the Jewish community in South Africa and its approach to the "others", fundamentalism, etc. This was in contrast to the first few phases when my reading focused mainly on new managerialism and on the history of Jewish education in South Africa.

Phase 7 – This involved writing the research report. This phase was more challenging and lengthy than imagined, and it progressed through a dialogue with the document and data analysis, as described in Phase 6.

Data collection techniques

Interviews, casual conversations, document analysis, personal accounts and observations were the main techniques used to investigate the restructuring of the Jewish community schools.

Interviews

The research relied heavily on interviews. By conducting the interviews I was immersed in the process of the schools' restructuring and was exposed to the meanings that stakeholders attached to these changes. I conducted mainly in-depth, semi-structured interviews. Slightly different schedules were used for different stakeholder groups in order to explore their specific areas of understanding and knowledge, but the gist was the same throughout (see Appendix 2). Secondary analysis of archived interviews was also used.[4]

The interviews lasted anywhere between 45 minutes to two-and-a-half hours each, at a place and time chosen by the interviewees, mostly at their homes. Confidentiality and anonymity were guaranteed. The interviews were preceded by telephone calls to colleagues and/or by formal letters (see Appendix 3), depending on my relationship with the respondent. The interviews were recorded, transcribed verbatim and analysed.

The first question, which was aimed at establishing rapport, was about the interviewee's role or involvement in the schools. Thereafter, I proceeded with four sets of questions. The first set aimed at eliciting the interviewee's knowledge and understanding of the restructuring – why did it occur, how did he/she hear about it, what was his/her involvement and what were the perceived outcomes to date? With community leaders, honorary officers and Manco members I also tried to draw out the short- and long-term goals of the restructuring, and to what extent they were aware of what was happening at the schools. The second set of questions were aimed at exploring the interviewee's feelings about the restructuring and the process – what were his/her expectations and concerns, how did he/she feel about the changes made and what did he/she consider to be the major challenges facing the schools? The third set of questions investigated the impact of the restructuring on the interviewee, how it impacted on his/her work, motivation, and status within the schools, and how it impacted on the schools' ethos, image, finances, religious base, community services, pupils, academic achievements and curriculum. The fourth set of questions dealt with the impact of the restructuring on the relationship between the interviewee and his/her colleagues as well as on his/her relationship with other stakeholder groups. The

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[4] Amongst these were interviews conducted by David Saks in 1998 for Gideon Shimoni's latest book, *Community and Conscience* (2003).

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interviewee was finally asked to direct me to other informants within his/her stakeholder group that either agreed or disagreed with his/her views.

The questions were slightly altered as time went on. For example, the question: *'How did you hear about the restructuring?'* became irrelevant after I established that most people had heard of the restructuring via rumours. When new developments took place, the stakeholders – especially at school level – focused on the issue of the moment and were not always sure what was included in the notion of "restructuring". Towards the end of the process, therefore, I omitted some questions and included new ones such as: *'What has changed in the last two years?'* or, *'If I were to walk into the schools now, what would I see that is different from what I saw two years ago?'*.

Prompts were used until the topics were exhausted. As I was aware that there is a gap between what people "do" and what people "say" (Hodder, 1998), I tended to follow many of the interviewees' statements with a request for an example or further explanation.

In the second round of interviews I targeted stakeholders who could give me specific information on evolving issues, and the resulting discussion usually focused on those issues. I conducted some repeat interviews and also targeted stakeholders who became significant players in the course of the restructuring. I ended the interview process by targeting scholars and community leaders who could reflect with me on the theoretical implications of the restructuring, with the aim of confirming or negating emerging themes.

Timing for the conducting of interviews was crucial. I had to have an almost tacit knowledge of when was the best time to approach stakeholders in order to get the most cooperation and openness. I realised that my respondents were going through various emotional stages as they were adapting to the changes (Marshak, 1996). They experienced different emotional reactions such as resistance, loss, grief and acceptance, and I wanted to record the associated feelings of each stage. I avoided interviewing stakeholders about an event as it happened or while it was still in the planning stage since those who were "in the know" were overly sensitive regarding confidentiality of information. Those who were excluded from the planning of an event were fed by rumours and fear. Moreover, there was the danger that by asking about an event that had not yet become common knowledge, I would be party to the spreading of these rumours and fears. Those who were instrumental in initiating the

restructuring were more willing to speak with me at the end of the research span, when it was felt that they were achieving their goals. It was then that I managed to secure some interviews which were denied to me a year earlier. Teachers, on the other hand, were eager to speak at the beginning stages of the restructuring, but became tired, scared and apathetic a year later.

In order to keep the dialogue between the stakeholder groups focused on the same topics, members of each group were interviewed at different stages throughout the life of the fieldwork. Table 3 indicates this spread and the number of interviewees in each category. Note that the timing of the interview matched the school calendar. The largest number of interviews in one month was during the July school holidays, when teachers are known to be more relaxed and have more time. There were few interviews in September, a month packed with Jewish festivals, but the number picked up again during the October school break.

Table 3 – **In-depth semi-structured interviews – schedule**

	Honorary officers (Board)	Other stakeholders	Community leaders	Managers	Teachers	Parents	Number of Interviews
2002							
February		2[5]					2
March			1				1
April				1	3	[1][6]	4
May			1	3	3	[2]	7
June				2	2		4
July	3	2	1	2	5	[4]	13
August	4	1		1	2	1 [4]	9
September		1					1
October	1	2	1	2	1	1	7
November		1			1	2 [1]	4
December		1					1
2003							
January			1		3	1 [2]	4
February		1			1	1	3
March	1	2		2	1		6
April		3	1				4
May		1	1				2
	9	17	7	13	22	6 [13]	72

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[5] These were unstructured interviews as the interviewees were leaving the country before my research instruments were ready. When I read the transcriptions of these interviews some months later, however, I realised that they contained information that I was not able to absorb at that time, but that had become useful for the research.

[6] The brackets signify parents who have been categorised in another stakeholder group, such as honorary officers, teachers, etc.

The interviews were often followed by a telephone conversation, thanking the interviewees for their time and cooperation. I occasionally used these conversations to raise some issues which I thought I may have missed during the interviews. We sometimes even ended up discussing the restructuring at a coffee bar. I often phoned the interviewees again when the transcriptions were ready and used this opportunity for another casual conversation. The conversations were then recorded in my journal and provided me with additional data and validity checks.

The restructuring of the Jewish community schools carried much emotional tension, not only for me but also for most of my interviewees. Many stakeholders had a great need to share and to speak about their experiences and interpretations of the process. It was not uncommon for agitated informants to start recounting their stories before I had a chance to set the tape-recorder or to ask the first question. At the beginning I tried to follow the schedule. However, I soon realised that these spontaneous outbursts were a good indication of what was foreground for my interviewees. In these cases the interviews became more of a conversation led by the interviewees but not controlled by them, as I was mostly able to steer them in the direction of my schedule when necessary.

The freedom to speak in a context that was becoming increasingly devoid of trust and free debate was welcomed by many interviewees. Some would even telephoned me after the interview to tell me that they had *'something important for my research'*, and would then proceed to describe what had happened at school that day. To some stakeholders the interviews were "therapeutic opportunities"[7] in which they were given a space to reconstruct and deal with their experiences. In these cases my role as a researcher almost bordered on that of a therapist, even though I have limited experience in that regard. The following excerpt demonstrates this point:

Interviewee:	But he [the CEO] didn't acknowledge me in any way – nothing.
CH:	*How does that make you feel?*
Interviewee:	Angry. I do feel angry.
CH:	*Ya.*
Interviewee:	It's nice to talk about it – there's nobody to talk to about it … It's lonely and you're isolated and there isn't really anybody to share anything with.[8]

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[7] See Birch and Miller (2000).

[8] Manager, 11 July 2002. [Document 29:46 (1396:1412). Codes: Researcher - nice to talk about it].

In other instances interviewees expressed gratitude for the opportunity to discuss their experiences without being contradicted or silenced:

> That's why I quite enjoy … talking to you. [This is] not a conversation I can have with just anybody. You know, it's not something everybody can relate to – I will lose them somewhere along [the way] …[9].

I was not always a willing "therapist" and I often regarded the interview as an "emotional labour" in which I had to conceal my own emotions and hurt in order to allow others to express theirs (Hochschild, 1983). Furthermore, some of the interviewees' anger was directed at the previous management, which was blamed for the corrupt handling of funds. Even though most respondents did not consider me to have been part of management because of my academic rather than administrative function, I saw myself as part of that group and felt that the criticism was directed towards myself. In the early interview stages I had a need to argue the point. Later on I started to explore this perception and secured good research data. Moreover, I was often swept up by the emotions that had engulfed the whole community, such as when the intention to close the school where my son was studying became a possibility. It must be understood that the restructuring of the Jewish community schools was the main topic of conversation in many homes and at social gatherings for almost two years. It was extremely difficult for me not to express an opinion, especially among friends and family. In order not to "get trapped" into debate I began using traditional interviewing techniques even in social encounters by denying any knowledge of the subject or by saying that *'I am no longer there'*. With time I became more knowledgeable of the process than most of my interviewees, yet it was important to give them the feeling that there were still things they could tell me. When the study progressed and the bigger picture became clearer to me, I was able to apply a reflexive approach and to reflect on the different worldviews that we all brought into the process. However, at the last phase of the research, when I was able to distance myself and made *'the familiar strange and the strange familiar'* (Comaroff & Comaroff, 1992:6), I felt that I no longer belonged in the community. This alienation carried its own pain and emotions.

Not all interviewees fell into the category described above. Some interviewees, mostly at lay leadership level, were very guarded and disclosed as little information as possible. Others, again at leadership level, elegantly avoided any

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[9] Parent, 31 January 2003. [Document 63:68 (1821:1827). Codes: Researcher - nice to talk about it].

controversial questions or even gave me misleading information which I was, however, able to discredit as I had enough corroborating data. Some of the lay leaders were able to control the interview process by discussing or dismissing certain topics. In some cases, especially when interviewing those with whom I disagreed, I spent valuable time establishing rapport. Consequently, important questions were neglected and vague or misleading answers were not challenged.

Interviews have their limitations. Apple (1993) maintains that much is still concealed in interviews since one always tries to put one's best foot forward. Moreover, *'no person completely understands either the meanings and causes of her or his actions or the underlying and often unconscious (and perhaps less laudatory) reasons certain paths are taken and not others'* (ibid:164). It is therefore important to corroborate the data with other means, as the following sections will demonstrate.

Casual conversations

I conducted frequent casual conversations with stakeholders, using a similar approach to that used in the interviews. I went through many cups of coffee and spent uncharacteristically long hours talking on the phone. I often found myself eavesdropping on conversations around me. Those I conversed with often knew that I was researching the restructuring of the schools, but I was not sure whether they knew what that meant or what I was looking for. On these occasions I tried not to initiate the conversation and instead waited for the subject to come up, which was inevitably the case. I usually approached people with bland questions such as *'What is happening now?'* or *'What are you doing now?'* and allowed the respondents to react in whatever way they chose. Stakeholders sometimes approached me and asked me similar questions. When I told them I was at university researching the restructuring they often proceeded to give me their interpretation of the process. I developed the habit of carrying a small tape recorder with me so that I could capture as much authentic communication as possible as soon as these conversations were over.

The fact that I was researching a very topical issue in the community turned my friends and family into my "research assistants". They were all interested in my study, which made it a less lonely pursuit. They became my eyes and ears and reported to me on what they thought was important data. There was no division between my private life and my research. My husband learned interviewing techniques by watching me and gathered information for me from his acquaintances.

A casual motherly question *'How was school today?'* was not meant to probe my child about his school experience but was meant instead to illicit information from him for my research. It was my son who eventually reminded me, as I turned another parents' evening into a fieldwork, that *'it [was] not all about [me]'*.

Observations

I saw myself oscillating between being a participant and a non-participant observer. I felt that, as a result of being a member of the community and also a parent, I was to a certain extent always a participant and part of the process I was investigating. As a past Board member and manager I participated in many of the events that took place prior to the restructuring of the Jewish community schools, and I had experienced first-hand the first few months of the restructuring until my retrenchment. As a "non-participant" observer, I observed numerous AGM and PTA meetings, conferences, and public and private meetings. I took notes of these meetings and recorded my feelings as well as the audience reaction to what was going on. I had to constantly examine my perceptions and compare them with other evidence, such as documents and interviews. My perceptions sometimes coincided with other sources; sometimes they varied. The degree of my involvement was uneven across the schools, depending on the opportunities and events that took place at each school. During these observations I had to keep a neutral stance and not get involved, even when my opinion was requested. Keeping silent did not make me into an "objective" observer; I always had hopes and fears for the meetings. I was happy when people managed to get the right information, and disappointed when I felt that they were being misled. I was frustrated by my forced "neutrality" and despondent when the "other side" was winning.

Personal accounts

I kept a journal throughout the research process. The daily entries contained reports and reflections on informal conversations with stakeholders, my observations of various meetings as well as my feelings and thoughts. I took notes regularly and promptly. I decided to write everything down, no matter how unimportant it seemed at the time. This proved to be most useful. When I later analysed the data I realised that the roots of certain developments were already recorded in my diary.

Keeping a diary had other advantages as well. First, it chronicled the restructuring process and was thus an essential tool in keeping the order of events. Second, as pointed out by Miller and Bell (2002), using a research diary to document access routes and decisions made throughout the research process is a practical way of developing an ethical and methodological checklist. Moreover, the practice of regular reflection helped ensure that ethical and methodological considerations were continuously assessed. Most importantly, the journal became my confidant, wherein I could safely express my emotions and reflect on my worldview.

Documents

Documentation for my research was abundant and provided me with a rich database. The following types of documents were used:

Board's documents – I used a comprehensive set of documents produced by and about the schools from the time of their establishment in 1948 until April 2003. These included mission statements, policies, proceedings of conferences, consultants' reports, the schools' magazines, the Board's newspaper *Davidi* (which was terminated during the restructuring process), previous academic research, school brochures and prospectuses, adverts, budget reports, etc.

The media – The local Jewish newspaper, *SA Jewish Report*, chronicles the history and activities of the local Jewish community. The editions from January 2001 to June 2003 were reviewed in order to explore the main issues that concerned the community during this period, as well as to examine how the restructuring of the Jewish community schools was featured in the newspaper. The most revealing data was what the newspaper did not report and the bias it exhibited. In this context, Macdonald (2001) urges researchers to notice the selectivity displayed by a newspaper and the bias imposed by its editorial policy. Moreover, he advises researchers to pay attention to distortion and propaganda where the source of the news is engaged in the wholesale creation of a particular point of view.

Correspondence – I was able to access most public letters and notices to parents or teachers from either the Board or the schools, open letters from teachers or parents to the Board, letters to the editor, etc. In the process of the investigation I was also able to access some private correspondences between stakeholders – these have not been quoted but the information gleaned was used when appropriate, without exposing the source of the data.

Minutes – I was able to access most of the Board's executive committee minutes, the minutes of the Employee Forum, as well as those of the PTAs and AGMs from all the schools. Furthermore, the CEO was obliged by labour law to consult with the "old management" as part of their retrenchment process. These consultations produced nine hours of recorded data in which the CEO spoke incessantly about his plans and initial experiences of the restructuring. The transcriptions of these tapes became an invaluable source of research data, especially as the CEO evaded a personal interview.

Even though the documentation was comprehensive, there were important gaps in the data. I did not have access to most of the Board's or the schools' internal documents. The same is true of financial records, correspondence between the CEO and various stakeholders, etc. I avoided asking for documents so as not to compromise my informants and only accepted those documents which were offered to me voluntarily. I am nevertheless convinced that I have enough documentation to support my findings.

Data analysis

The transcripts of the interviews and my personal diary produced over 1700 pages of text, and I was able to manage this data by using Atlas.ti. In the first stage of analysis I coded and recoded the interviews line by line, which helped me to discover recurring themes and to develop ideas and concepts. For example, Table 4 illustrates how the response to the question *'What is your understanding of the restructuring?'* was analysed:

Table 4 – Analysing text

Interview – Community leader, 8 May 2002. Interview number: 76 (example)	Code
Well, I'm somebody that is not happy with the way the Board is being restructured, and I can't say that I understand fully what the intention is.	76:1 (4:6) Understanding – not clear – secretive – hidden agenda
The restructuring of the Board came about *because* of the financial mismanagement of the Board of Education, for which there are a number of people that could be held *accountable* for this situation.	76:2 (6:9) Reason – mismanagement (Comment – blame and accountability)
Primary to this situation is probably that we *did not have adequate leadership* – people that were not able to control situations, were placed in areas of high responsibility and nevertheless, it was just assumed they would cope with the situation. And they share some of the *blame* perhaps, but I'm not sure it's a fair blame that they carry because it was too high an expectation.	76:3 (9:15) Reason – leadership was not adequate (Comment – emerging theme – blame)

Part of this problem came about *because of emigration.* We were short of people to appoint. The search possibilities were not adequately done.	76:4 (15:18) Reason – emigration

The numbers 76:1 (4:6) – mean that it is document number 76 in Atlas.ti, quotation number 1, lines 4–6. All this information is available in the footnote corresponding to each quotation, together with the code's label, for example:

Community leader, 8 May 2002. [Document 76:2 (6:9). Codes: Understanding - financial].

I began by accumulating codes such as: "understanding – financial" or "understanding – only Hebrew was restructured", etc. Figure 1 illustrates the numerous codes that were associated with the family "understanding of the restructuring", which corresponded to the different perceptions and understandings of the process. The number in the brackets indicates the number of quotations associated with each code. The tilde (~) indicates that a comment was attached to the code, or that this code had been amalgamated with ex-codes (see also Figure 2).

Figure 1 Family – understanding of the restructuring (1)

Understanding – attack on teachers and professionalism {1-0}
Understanding – coup d'etat {4-0}
Understanding – did not affect me {1-0}~
Understanding – financial {11-0}
Understanding – only Hebrew has been restructured {2-0}
Understanding – ideological {3-0}
Understanding – minimising staff for financial reasons {3-0}
Understanding – more work for Hebrew teachers {1-0}
Understanding – not clear – secretive – hidden agenda {6-0}~
Understanding – not clear whether financial or educational {3-0}
Understanding – not clear whether financial or ideological {3-0}
Understanding – nothing has changed {4-0}
Understanding – the Board has been restructured {2-0}~
Understanding – the CEO top-down restructuring {4-0}
Understanding – the only way to save the school {3-0}

While the codes in Figure 1 provided me with the stakeholders' first reaction to the question: *'What is your understanding of the restructuring?'* the deeper meanings of these perceptions were generated in different stages of the interviews, as is demonstrated in Figure 2, and were gathered under the code names beginning with *restructuring*. For example, 'restructuring – change the people in power'; 'restructuring – not going to work'. Figure 2 illustrates how these codes were defined, by coding and recoding the data. Each code name included the ex-codes and some of

the comments that made it up. The comments reflect my thinking and the process by which theory was generated.

Figure 2 – Family – understanding of the restructuring (2)

Restructuring – Change the people in power {1-0}
Restructuring – Concerns {19-0}~
    Ex-code – Restructuring – not going to work
Restructuring – Consultation {32-0}~
        [Difference between consultation and participation.]
        [Stakeholders were quite happy with the facade of consultation – can it depend on the zone of tolerance? They just don't want to be told what to do – but they do not have a strong opinion this way or the other.]
        [When other stakeholders' ideas were used it has been used to serve as justification for preconceived beliefs and ideas.]
    Ex-code – CEO – consulting with people outside the community.
    Ex-code – Process – need to work together
        [Some stakeholders whom the CEO claimed that he has consulted denied meeting or discussing certain issues with him.]
    Ex-code – Restructuring – Consultation – giving a façade
    Ex-code – Process – consultation – using stakeholders as a sounding board.
    Ex-code – Process – consultation with the wrong people.
Restructuring – creating distrust between teachers and parents {7-0}~
        [Creating distrust is part of manufactured uncertainty...]
    Ex-code – CEO – seeking parents' support
Restructuring – crisis management {17-0}~
    Ex-code – Restructuring – need to be drastic
    Ex-code – Restructuring – needs to be harsh
Restructuring – dishonest and deceitful {4-0}~
    Ex-code – Restructuring – deceitful
Restructuring – Expectation {16-0}
Restructuring – Expectation – but nothing happened {7-0}~
    Ex-code – Restructuring – expectation – disillusions
    Ex-code – Restructuring – did not change what needed to be changed
Restructuring – Expectations – more professionalism {1-0}
Restructuring – Explaining lack of consultation {7-0}
Restructuring – Financial or educational {12-0}~
    Ex-code – Financial or educational consideration
Restructuring – financial or ideological {8-0}~
        [There is interplay between ideologies and financial that it was not uncommon to have an informant telling me at the beginning of the process that it was ideological and later change their mind – hegemony? Common sense?]
Restructuring – Had to happen {3-0}
Restructuring – Hearing about it {9-0}~
    Ex-code – hearing about changes at social gathering
    Ex-code – Restructuring – heard about it through the grapevine
    Ex-code – Management – hearing about changes in their department/school from general letters to parents
Restructuring – Hidden agenda {15-0}~
    Ex-code – CEO – hidden agenda
    Ex-code – Hidden agenda – CEO
Restructuring – Impulsive decisions {4-0}
Restructuring – Long term planning {9-0}

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Restructuring – No change at school level {11-0}~
    Ex-code – Restructuring – the schools run as before
    Ex-code – Restructuring – did not impact the school
Restructuring – No clear map of change {16-0}~
    Ex-code – Restructuring – not clear
    Ex-code – Process – mixed versions
    Ex-code – Process – none of this was clear
    Ex-code – Process – orders were given and retracted
    Ex-code – Process – secretive and anonymous
    Ex-code – Process – too hasty
Restructuring – No communication {6-0}
Restructuring – no transparency {10-0}~
    Ex-code – Process – mystery
    Ex-code – Process – instructions are not in writing
    Ex-code – Restructuring – anonymous
Restructuring – No trust {13-0}
Restructuring – Part of a bigger change in SA {2-0}
Restructuring – Quick fix {7-0}
Restructuring – Rumours and uncertainty {18-0}~
    Ex-code – Rumour
    Ex-code – Gossip
Restructuring – Top-down {15-0}
Restructuring – Was good for the system {8-0}~
    Ex-code – Restructuring – had to happen
    Ex-code – Reason – it had to happen
Restructuring went bad – Need miracle {14-0}
Restructuring went bad – Who is to blame {6-0}

I inevitably accumulated a great number of codes (539), which I grouped into families according to the topic. Figure 3 describes some of these families. The numbers in brackets indicate the number of codes associated with each family.

Figure 3 – Code families

CEO (68)
Cost cutting (31)
Centralisation vs. decentralisation (3)
Goal setting (12)
Hebrew vs. Jewish Studies (11)
Parents (18)
Previous Board (13)
Process of restructuring (33)
Reasons for restructuring (25)
Teachers' reaction to change (13)
Understanding of restructuring 1(16)
Reasons for financial deficits (19)
Impact on managers (31)
Impact on parents (28)
Impact on teachers (28)

I initially looked for codes that answered my research questions while highlighting the managerialist terminology, such as cost cutting, efficiency, accountability, etc. As the

story unravelled and a theory was constructed, a secondary layer of analysis allowed me to alter, redefine and delete categories according to the emerging themes. I added a few families, such as "resistance", "restructuring by consent", "manufactured uncertainties", "bullying and coercion", "blame and guilt", etc. and collected all the codes that would substantiate those claims.

I used only limited functions within Atlas.ti; I had to make a trade-off between dedicating valuable time either to learning the software or to investing it in fieldwork and reading. At the later stage of the research, when I was writing my dissertation, I realised that some of my codes were too broad and in some cases I had to re-code them. For example, in the code "impact of the restructuring on the religious base", I included all the quotations; those that supported the view that there was a definite change and those that maintained the opposite view. I came up with 54 quotations. Sometimes, few quotations were collected in one interviewee. I therefore had to re-code them in order to get some quantitative indication as well as to choose one quotation for each interviewee, as illustrated in Figure 4:

Figure 4 – Re-coding "impact on religious base"

Impact - religious base (54)
Impact - religious base - dichotomy (3)
Impact - religious base - has already been changed (9)
Impact - religious base - more impetus (12)
Impact - religious base - no change (11)

I found Atlas.ti to be especially useful for stakeholder research. It allowed me to separate the interviews into different stakeholder groups and I was therefore able to isolate and compare their views. The software allowed me to examine particular themes in isolation by retrieving data associated with them. Figure 5 is an example of an output document in which all quotations for the code: "financial situation – improved", were collected together from across the whole database. Reading and rereading the quotations for each code allowed me to account for the diverse perspectives. However, this segmentation often broke the sequence of an interview and had the danger of taking sentences out of context. It was therefore important to refer to the interviews as a whole.

Figure 5 – 9 quotation(s) for code: financial situation – improved

Manager - 21.4.02.txt - 4:2 (23:24). Codes: [Financial situation - improved]
I know that the financial situation is much better than it ever was.

Teacher - 14.4.02.txt - 13:23 (362:374). Codes: [Financial situation - improved]

There are a lot of positives. The fact is that a lot of pressure – somehow we feel that that financial pressure – that we have been relieved of the fact that that's been taken care of. And I really do think that's a good thing, because I do think that in the past the Jewish Board of Education didn't have anybody who was sufficiently qualified or experienced, to deal with the financial side.

Manager - 4.11.02.txt - 19:33 (582:584). Codes: [Financial situation - improved]

Look, I think the financial position has improved. I don't know whether a good accountant couldn't have done, without all the trauma that went along.

Manager - 1.7.02.txt - 36:11 (674:715). Codes: [Financial situation - improved]

My theory was … that a lot of people were putting money in before and watching it going into a bottomless pit that was not being administered properly and they eventually said 'No more'. I truly believe … that the way the previous group administered the finances was pathetic, there was abuse, there were expenses incurred that were laughable … and I do believe that when [the CEO] came in and said: 'Right, those expenses are going to stop, that kind of abuse of money, that kind of maladministration of money is coming to an end' then those people said: 'OK, fine, provided it is being used in the correct way we will still stand by Jewish education'. And I think those same people are there. We never knew who they were … but there must have been a lot of others and I think they have come back and they are giving the money.

Parent - 14.8.02.txt - 40:61 (1180:1189). Codes: [Financial situation - improved]

I don't think that what [the CEO] did, someone else may have done differently if they would have been brought in.

Honorary officer - 13.8.02.txt - 45:20 (472:496). Codes: [Financial situation - improved]

Look, [the financial position] is, in inverted commas, under control. It will never be totally under control because everything is dependent on how much subsidies you have to grant, and the number of people who can't afford fees. And unfortunately this position is probably going to get worse rather than better because we still face an emigration of round about 2–3% of our school population every year. … But I think the schools are now actually running at a profit, or at break-even, with the exception of Victory Park where I think there's a small loss there, but nothing material overall. … The idea was that once at least the schools stop bleeding, that you could then approach major donors in the community and say – look, we've got it as much under controlled as we can. We still need R8 million, or R10 million a year, to subsidise those families who cannot afford fees.

Honorary officer - 27.8.02.txt - 46:26 (795:799). Codes: [Financial situation - improved]

From what I've been told and from what I've been shown in terms of graphs, I mean I haven't sat there and gone through figures and that – but I believe it is better.

Manco member - 07.03.03.txt - 65:25 (825:848). Codes: [Financial situation - improved]

The first year I was in, those first few months, we lost R4 million. The first year that [the CEO] was in we made R400,000 and this year we are going to

> make R13 million … we are going to have a surplus of 13 million … We still have liabilities which we have to pay off … but we don't operate with an overdraft anymore. We don't have major donors that are coming in. It has been operating costs to save money, its been amazing … It's that turning around from closing schools to not closing schools.

Manco member - 07.03.03.txt - 65:41 (1194:1202). Codes: [Financial situation - improved]

> Yes the financial situation is brilliant. We still have debt and we want to pay it off. We can't rely on the community as they are all battling. We realised that the community was not going come to us and they were not going to put money into a bottomless pit. And in fact the IUA and UCF, they've cut the allowance to us and they haven't got the money so we have to do it ourselves.

Writing the dissertation

I had two audiences in mind while writing the story of the Jewish community schools' restructuring: the research community; and the school community. The former required a detailed description of the cultural, social and ideological aspects in order to understand the context within which the restructuring took place. My main concern with the latter was to represent their actions and thoughts truthfully and in a sensitive way, as well as to ensure as much as possible the confidentiality and anonymity of those who were represented in the case study. Moreover, while the research audience is interested in the theoretical explication and the methodology of the case study, the school community is interested to know what happened and why. This required a compromise between telling the story, explaining it and theorising it.

The writing posed a few challenges for me, such as data reduction and selection, striking a balance between description and analysis, and de-emotionalising the text. I found the latter to be the most demanding task. While emotions played an important part in the process of the research, and had been acknowledged as such, it was also important to control them in order to theorise the findings. The process of de-emotionalising the text required constant writing and rewriting that may have not been necessary in a less emotional context. My supervisors' input in this progression was vital as they constantly made me aware of examples where my personal identity took over my identity as a researcher.

The research report was organised according to emerging themes and constructs relating to the conceptual framework, rather than following a sequential description. There were two exceptions to the thematic analysis. The one was the Prologue, in which a panoramic view of the process was provided. The second was

the vignettes. In each vignette a single policy was followed from initiation to implementation. A vignette is described as *'a focus description of a series of events taken to be representative, typical, or emblematic'* for the case study (Miles & Huberman, 1994:81). It has a narrative, story-like structure that preserves chronological flow. The vignette thus provided a detailed portrayal of a selected policy, in which the various constructs identified in the case were described in natural sequence of their occurrence and in real time.

Validity

There are multiple notions of validity. In this research I refer to validity as the trustworthiness of the reported observations, interpretations and inferences, as well as the research applicability to readers.

In order to increase the validity of the case study, I introduced the following checks:

- The most obvious validity check was triangulation, that is, the convergence and divergence among multiple methods, empirical materials and perspectives (Cohen & Manion, 1994). Triangulation reflected an attempt to secure an in-depth understanding of the restructuring of the Jewish community schools, bearing in mind that objective reality could never be captured. Especially relevant to my study was the triangulation of sources and methods of collection. The methods included interviews, document analysis and personal accounts. The sources included different stakeholders. Owing to the interconnectedness of my respondents and the abundance of rumours and hearsay, I tried to ensure that the information did not originate from the same source. I therefore often asked my interviewees for the source of their knowledge. Since I had to rely in many instances on what informants said without observing for myself, I sought corroboration wherever possible by cross-checking different accounts of the same situation and by referring to documentary evidence.

- It is clear that I entered the research with a certain worldview and that the research was influenced by my emotions. In order to ensure validity, my personal worldview, assumptions, emotions and beliefs were disclosed. Keeping a personal research diary in which I was able to reflect on my assumptions with regard to the data collected, facilitated this process. Altheide and Johnson (1998) describe it as

"validity as reflexive accounting"; a process that places the researcher, the topic and the sense-making process in interaction. Researchers have to substantiate their interpretations and findings with a reflexive account of themselves and the process of their research. They must be committed to obtaining the members' perspectives on the social reality of the observed setting, to report the multi-vocality and to show, if possible, where the author's voice is located in relation to these. It is based on the notion that all knowledge is perspectival and that the reader must have an explicit statement about *where the author is coming from'* (ibid:294).

- Member checking increased the trustworthiness of the accounts. It involved taking data back to the informants, discussing with them whether the interviews reflected their attitudes and then incorporating their comments into the research. This validity check was in line with my epistemological belief that there were many "truths" and that these were relative to one's personal worldview. Moreover, member checking is considered to be an ethical handling of the research findings as it allows informants to control the facts that affect them and how these facts are used in the research (Walker, 1980). I found advantages and disadvantages to this approach. On the one hand, it increased the validity of my research, especially since the transcriptions were sent back to the informants a few months after the interviews had taken place. Confirmation of the transcription and the conversation that followed validated the data and even provided some longitudinal perspective. On the other hand, as the restructuring process became more ruthless and an atmosphere of suspicion and fear prevailed, some interviewees were concerned about what they had revealed to me. Even though they confirmed the transcripts, they were afraid that they might be identified. I realised that sending the interviews back to the respondents increased their feelings of disempowerment, rather than empowerment. I then decided to send back transcripts only to those who had requested such.

- Peer examination is a valuable procedure by which external observers review the data and the research process. It provides an additional, relatively "objective", lens through which the researcher is able to reflect on the experience. As this research was done for a degree purpose, my supervisors provided this validity check.

- In a qualitative case study it is important to be realistically modest with regard to the extent to which the findings can be generalised outside the case study or even

within the case study stakeholders. I am nevertheless confident that my findings can be extended beyond my 72 interviewees. I received confirmation of that when I fed some findings back into the system a few months after I had concluded the fieldwork. When I spoke on two occasions to an audience of some 600 people in June 2003, my interpretation of the restructuring provided them with a "click of recognition" experience, described by Lather (1986) as "face validity". The participants subsequently issued a vote of "no confidence" in the Board, which became instrumental in the later suspension of the CEO.[10] This provided me with another validity check, described by Lather as "catalytic validity" and represents the degree to which the research energises the participants towards action and the transformation of their reality.

The limits of the research

This study explores the experiences of the stakeholders of the Jewish community schools during the organisation's restructuring. By virtue of it being a qualitative case study of a unique system, the research limits the potential for generalisations or for inferences that can be drawn from it.

The research spanned the first two years of the restructuring. It could therefore mostly provide a snapshot of the reform at its earliest stage, which usually focuses on the initial structural change – while change in consciousness or practices takes place slowly, sometimes almost imperceptibly over time (Ball, 1997a). Ball further maintains that it is not clear at what point it is valid to begin to draw conclusions about the effects of policy. It is for this reason that I prefer to use the term "impact" rather than "effect". Moreover, this research was done as a requirement for a PhD degree and was therefore limited in time and resources. This is a characteristic of many case studies, where practical and empirical issues are often interwoven with the research design. It is further claimed that case studies are never finished, just left (Walker, 1980), usually at the point of "data saturation" whereby the information becomes redundant (Bogdan & Biklen, 1982).

Any research that attempts to explore a process of restructuring invariably contains a comparison between the new structures and the old ones. While the former was the topic of this case study, the latter needed to be constructed. The "story" of the

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[10] See Chapter 6.

schools was constructed over the years by various writings, mostly generated by the schools or the Board, by pictures, adverts, events, celebrations and mostly by memories and reflective accounts of students, ex-students, parents, teachers and other stakeholders. Research was mostly complimentary; rigorous social inquiry was absent and criticism was limited and was dealt with in an ad hoc manner. However, despite the lack of reliable evidence, these images have an enduring power to affect both consciousness and behaviours (Grace, 2002). In fact this "imagined" community becomes the reality against which the impact of the restructuring could be understood.

The limitation of this approach is the tendency of many stakeholders to romanticise the past while trying to come to terms with the emotions of change. In a way, therefore, this study could contrast the best of the imagined community with the worst of the managerialist reform.

Another limitation for the research relates to my "insider" position, yet it also gave me an advantage. As an educationalist, researcher, parent, member of the community and a past employee of the Board, I had an intimate knowledge and interest in the schools and the wider community. This knowledge placed me in a unique position to listen to the voices from the inside and to investigate a process that will probably have an irrevocable impact on the community. However, I was clearly not observing the process from a position of detachment. I was involved at all levels: intellectually, emotionally, religiously and professionally. This raised a strong potential for bias which I tried to neutralise by self-questioning, by reflecting on my motives and assumptions and disclosing them in my personal journal, and by the constant searching for disconfirming evidence.

Another limitation is added by my previous position at the Board and my retrenchment. It is suggested that the personal and professional identity of researchers would have some significance on the way people respond to them (Cooper, 2001). For example, stakeholders who supported the change and who were instrumental in my retrenchment did not feel comfortable during the interviews. It was important to encourage them to relate to me as a researcher and not as a past employee. At the same time, many other stakeholders trusted me, and revealed their stories to me because of my past position.

As this chapter clearly illustrates, the case study was emotionally charged. I did not, however, perceive emotions as a limitation but rather as an additional layer of meaning which contributed to a deeper understanding of the change process.

Lastly, I am aware of my need to protect the "inside stories" of the community, the schools and my colleagues, as the system is identified and personalities can be recognised. Some names are mentioned, especially those quoted in the Jewish community newspaper, but I tried to omit any data that could clearly identify a respondent or that could be interpreted as an attack on certain personalities.

Ethical considerations

Ethical concerns cropped up throughout the research process and appeared in many forms. They emerged when I tried to achieve a balance between my intentions, on the one hand, to know and expose the hidden processes at work in the restructuring of the Jewish community schools and, on the other hand, to protect the privacy of individuals and the schools, as well as to protect the image of the Jewish community and not to uncover processes that might be exploited by those who have a less favourable view of the community.

By adopting a reflexive approach to the research I was engaged with the following dilemmas:

- The informed consent of my respondents was a major ethical dilemma for me. Even though my respondents were happy to cooperate as long as they remained anonymous, I am quite sure that most did not have a full understanding of how some of the information they had provided me would be used. In one case, I was asked by a stakeholder whether she was allowed to give me the minutes of a committee she was involved in. I had to inform her that legally she was not allowed to do so, but was grateful when she ignored my advice. I am sure that in some cases I received minutes or documents from stakeholders who wanted me to expose certain processes. I therefore found myself treading a thin line between giving voice to respondents, betraying them and being used by them.

- I constantly debated to what extent it was ethical to be friendly and to establish a relationship of trust with my interviewees, especially those with whom I disagreed. Moreover, I was troubled by the ethics of turning casual conversations with stakeholders into research data without their knowledge. I tried to overcome these challenges by ensuring maximum confidentiality and anonymity. When citing an interview I identified most respondents only by category. Each category included a few positions. For example, the management category included

principals, their deputies and vices as well as coordinators at a system level. Interviewees could be placed in more than one category. For example, an art teacher who was also a deputy principal and a parent could be identified by any one of those categories, depending on the topic that was being investigated and what would give the interviewee the best cover. I realised, however, that this cover would never be complete. I am sure that in many cases the "community" would know who the informants were. Some could be recognised by the way they think, by the way they talk or by their actions. Moreover, some stakeholders' identities could not be disguised and they were therefore described by their positions. These included the CEO and other members of the management committee (Manco). Still, when possible I referred to them as lay leaders or honorary officers.

- Since the investigation was an emotional challenge for me, I had a need to share and speak about my experiences. My supervisors and family were a safe sounding board. A unique ethical dilemma emerged when one of my co-supervisors, who was also a parent at one of the schools, became involved in defying the new management. While having a co-supervisor viewing the restructuring process with me added another lens and much depth to the case study, ethically it affected us both. At one stage we refrained from discussing the process so as not to influence the research. I was careful not to reveal my sources even to her. After I concluded the fieldwork we cooperated in writing articles and letters to the local newspaper and in addressing parents' meetings.

- Another ethical dilemma emerged when I refused to help stakeholders, even when I had the knowledge/power to do so. I often wanted to shout out in PTA meetings that the information the speakers were giving was simply a manipulation of the facts. On one occasion I could not tell a friend that a Manco member was deceiving her. I knew that my uncritical acceptance of the stakeholders' perceptions helped to reinforce some misconceptions. I was often frustrated by my self-imposed silence, especially when I realised that by the time my findings would appear most of the processes would be completed, and most of those in charge would have moved on, after achieving their immediate goals and sometimes receiving financial benefits. I slowly came to terms with my role as a researcher, which was infinitely different to my previous role as an educator. As

an educator my role was to help and to educate; as a researcher my role was to observe and understand. This shift from educator to researcher is referred to by Labaree (2003) as the cultural divide between adopting a normative perspective to adopting an analytical perspective to education. He rightly maintains that novice researchers should be made aware of this divide and the means to bridge it.

- Being a member of the Jewish community exposed me to the perennial problem of Jewish researchers, that is, the extent to which we would like to expose the "inside" stories of our community to outsiders, especially as I was not indifferent to the community's feeling of isolation and depression, and the increasing incidence of anti-Semitism worldwide. I constantly debated whether uncovering processes in the community and disseminating the research findings would mean I was being disloyal to the community. I was concerned whether my findings would be used to the disadvantage of the community. I argued these issues with various stakeholders who often make their opinions heard in public. Three different approaches emerged. The one distinctive approach was that debate and open inquiry should always be avoided, as it would "destabilise the community", display its flaws to the outside world and might therefore increase anti-Semitism. This type of thinking is demonstrated in Chapter 3 of this dissertation and will be discussed again later. The second approach was that it was important to be sensitive to the context and the times and not to be too critical:

  > Ten years ago, I could say my job was to look under the carpet and to see what was there and what was being hidden. This is still my responsibility, but maybe the boundaries have shifted: that the need for some kind of comfort for the community is greater today than it was before. The community is in crisis; Jews are in crisis all over the world … [but] eventually you have got to be true to yourself … but it's complicated.[11]

The next interviewee suggested a similar approach:

> My own view is that provided you put it in a sensitive context and acknowledge the difficulties that a small community of Jews of less than eighty to ninety thousand … with a history … of an anxiety that they weren't going to be wanted at all ... It's perfectly understandable that we would have behaved in this fashion. If you put it in this context I think you should go for it. The contrary proposition is to keep silent, which is what the establishment wants you to do … In the long run those of us who keep silent about this … what are we going to pass down to our children? That is the real question.[12]

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[11] Other stakeholder, 6 March 2003. [Document 67:24 (581:598). Codes: Ethical issues].
[12] Community leader, 3 June 1003. [Document 73:9 (382:423). Codes: Ethical issues].

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The third approach was that the diversity in the community should be acknowledged at all times and that one should not suppress any kind of inquiry or open debate. The following citation exemplifies this approach:

> I don't have that dilemma, precisely because I think … there is only one way in which that can end up. It can only create a situation in which small groups of people control a community without any challenge ... . So I don't think it is loyal to allow that to happen. … Sending out a message that there's no diversity in this community – that everybody thinks the same – is to me absurd. In what way does that make anybody respect you more? That we are all working like robots? If Saddam Hussein gets 100% of the votes, is anybody impressed with it ... obviously not.[13]

I eventually came to a decision that being loyal to the community meant to be truthful to its members, to respect their right to know about processes that impacted on their lives, and to celebrate the diversity within the community. At the same time it was vital to keep a constant mental view of the context and to acknowledge the uncertainties, fears and difficulties that stakeholders encountered while adapting to rapid changes in transitional times.

On reflection, my responses to the above dilemmas were not always ethical. Compromises and mistakes were made along the way. In some cases I felt like a spy in my own community. I realised that I was using interviewees' painful experiences as "interesting" research data. I sometimes faked rapport to encourage interviewees to trust me with their stories. Duncombe and Jessop (2002) describe similar tactics and argue that the skills of "doing rapport" have been commodified in the training of qualitative researchers. In this context Fontana and Frey (1998) also argue that most traditional in-depth interviewing is inherently unethical, whether wittingly or unwittingly, and that the techniques and tactics of interviewing are really ways of manipulating respondents while treating them as objects rather than as individual human beings. Finch (1984) aptly describes her feelings of betrayal when she comments that she emerges from interviews with the feeling that the interviewees need to know how to protect themselves from people like her. She feels that the information she gets in return for flimsy guarantees of confidentiality has real exploitative potential. At the same time Duncombe and Jessop (2002) remind us that interviewees are not totally powerless and that they can withdraw their participation.

By constantly reflecting on the above ethical dilemmas I realised that I needed to decide to whom I am accountable. Being accountable limits the choices one can make in the pursuit of truth. Burgess (1994) maintains that researchers need to strike a

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[13] Other stakeholder, 8 November 2002. [Document 32:29 (1102:1163). Codes: Ethical issues].

balance between moral accountability and responsibility to those who are researched; professional accountability in relation to ethical codes and principles, such as the right of the researcher to disseminate data and to whom the data belongs; and contractual accountability, that is, accountability to one's sponsor or employer. As I had no sponsor or employer, I realised that I am first and foremost accountable to my interviewees and to the people who put their trust in me. Being accountable to my interviewees motivated me to represent them faithfully, without exposing their identity.

Being accountable to my respondents required me to reflect and expose my position with regard to them and to my research topic. It is clear that in terms of my research topic I was both an insider and an outsider. This duality produced opportunities and challenges. The opportunities arose from my intimate knowledge of the system and its recent and not so recent history, as well as the power structures and the individuals associated with the system. It also brought up some challenges as to what extent my pre-knowledge influenced the choice of respondents. It required me to reflect constantly on my choices, and occasionally to approach some informants whom I would not have approached under personal circumstances.

Being both an insider and an outsider presented me with more ethical dilemmas. Griffiths (1998) makes this point very clear when she argues that the researcher as an insider is drawing on the normal ground rules of reciprocity and trust that characterise social interactions. Being a researcher means using these ground rules for research purposes, thus risking exploitation and betrayal.

Being both an insider and an outsider further impacted on my feelings towards my interviewees. At the beginning I felt anger, especially towards those who were instrumental in my retrenchment or towards those colleagues who eagerly took over some of my roles and the work that I had produced over the years. I felt sorry for those school members who were struggling to make sense of the changes and who were trying to keep their jobs and livelihoods, while being bullied by management. I was annoyed when informants refused to make their objections public and to act on what they revealed to me, especially when I felt that they were compliant for the sake of political expediency and self-interest. I was grateful to those stakeholders who did their utmost to help me with the research and who collected data for me. I was encouraged by those stakeholders (regrettably, only a few) who took a moral stand against some processes or individuals, regardless of personal discomfort.

As the restructuring proceeded I felt that I became a confidant and a sounding board for many stakeholders. I felt that some informants eagerly unburdened themselves on me, recounting their fears, rumours and disagreements in the hope that I would act on their behalf. Towards the end of my fieldwork I was emotionally exhausted and I started to resent this role. I had to remind myself constantly that I had submitted myself to this role for my own selfish needs, that is, writing a doctorate. This posed another ethical predicament for me, namely: Was it fair to stop being a sounding board after I completed the fieldwork and no longer required the information? When I eventually detached myself from my respondents I was acutely aware of Ball's (1997a) comment that research is always in some degree both reactive and parasitic. He maintains that:

> Careers and reputations are made as our research flourishes upon the rotting remains of the Keyensian Welfare State. Both those inside the policy discourse and those whose professional identities are established through antagonism towards the discourse benefit from the uncertainties and tragedies of reform. Critical researchers, apparently safely ensconced in the moral high ground, nonetheless make a livelihood trading in the artefacts of misery and broken dreams of practitioners. None of us remains untainted by the incentives and disciplines of the new moral economy (257).

In summary, through constant self-examination, reflection and ongoing discussions with colleagues, I am confident that I have confronted many of the problems associated with this kind of research. I do not claim that my research is objective, since complete objectivity is not possible (Peshkin, 1988), but I believe that I was able to describe the different worldviews, mine included. I also believe that my emotions were not a hindrance or a source of bias, but rather the fuel that challenged me, gave me the passion for my research and provided me with both a perspective and an insight that an "objective" and uninvolved researcher might never have achieved. The importance of emotions in research is relatively unexplored terrain. Hargreaves (1998b) makes the point that emotions are an integral part of rational thinking, as one needs to feel in order to judge. Likewise, McLaughlin (2003) argues against the polarity of reason and emotions and calls researchers to engage in the emotions induced by the loss of control, risk taking and confusion as part of the research process. My experience confirms Mclaughlin's conclusion that:

> Emotional blindness will not enhance the research process: it will only drive underground the examination of assumptions and processes in individuals and groups that hinder fruitful exploration (2003:78).

From the research I have learned about my history, my community and myself. I have learned the virtue of patience and the art of waiting. I have learned not to be swept up by rumours and hearsay and not to get caught up in emotional reactions. I have learned to feign ignorance and to ask rather than answer. I have learned to remain silent and to resist the temptation to correct errors of interpretation. I have learned to identify my feelings and to act on them. I have learned that there is no useless information. I have learned to listen, to collect pieces of evidence and to wait until they can be patched together to complete the puzzle, that is, the *bricolage*. And I believe, finally, that these valuable lessons kept me writing within the boundaries of a responsible qualitative research report.

Chapter 5

The cost of saving the Jewish community schools

This chapter explores the different understandings and perceptions among stakeholders as to why and how the restructuring of the Jewish community schools occurred. It analyses the responses to two separate research questions. The first question investigates stakeholders' understanding as to why the restructuring occurred, how they heard about it, what the outcomes to date were, as well as their role in the process. The second question investigates stakeholders' expectations and concerns with respect to the restructuring and their experiences of the process. The stakeholders' experiences and stories provide a means of capturing the complexity of the restructuring and clarify the different levels of meaning that the change held for them.

In Chapter 3 I discussed the ideological, financial and managerial background to the restructuring. In this chapter I will show that there was no common understanding among stakeholders as to the purpose and direction of the change. The avalanche of policies – some implemented and others abandoned – left many stakeholders confused and suspicious about the goals of the reform. While the financial aspect of the restructuring emerged from the data as the main reason for the change, stakeholders began to consider whether there were hidden agendas behind this rationale, and whether it was perhaps a pretext for the infiltration of Ultra Orthodox practices into the community schools. Doubts and suspicions were intensified as the restructuring began to affect those areas that were considered to be the "heart and the soul" of the schools, such as their assumed educational achievements, the community services that they provided as well as their "broadly national-traditional" ideological position. It was therefore felt that the restructuring was an attempt to undermine the "imagined" community schools and to reconstruct a new identity for the organisation "behind the backs" of the stakeholders. All these notions created what Hargreaves (2003) has termed "a community of suspicious minds", and generated negative feelings and emotions towards the restructuring.

Interestingly, the evidence suggests that the ideological rationale of the restructuring was not obvious to many stakeholders, even though public and private declarations of intent to make the schools "more Jewish" were often made. I will show that the restructuring functioned mainly to highlight the ideological shift that

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had already taken place in the schools and in the community and thus it had alerted the otherwise indifferent community to the Orthodox hegemony. Nonetheless, the restructuring also established new structures that could eventually accelerate the ideological shift to the "right". This resulted in support as well as resistance to the change, and in further fragmentation of the community.

The data analysis reveals that the respondents perceived the restructuring as an authoritarian top-down change process, too broad and too quick to substantially affect the system. The seemingly short-term mandate of the CEO, and the fact that his remuneration was directly linked to the financial recovery of the organisation were perceived to have initiated a process of pure "economism" rather than restructuring or reculturing, whereby visibility and rhetoric took precedence over coherency and integrity. I will show that there was very little "buy in" into the process from the stakeholders, and compliance was achieved by resorting to bullying tactics, including the silencing of critics, pressurising resistors to leave, threats and shaming. These bullying strategies elevated the power of the CEO and at the same time discredited and ridiculed those who opposed him. While initially the harshness of the process was justified as being "crisis management" in the face of the huge debt and the perceived inefficiency of the organisation, it soon lost credibility and legitimacy. I will argue that the main achievement of the restructuring was to change those in power and to shift control of the schools to the religious establishment, while marginalising the power of the parents and professionals. The loss of control and disempowerment felt by many stakeholders resulted in people turning against each other. Emotions of blame and guilt were followed with depression and submission. Those feelings were exploited by the management to gather support for the restructuring.

Throughout the chapter, I will point out the apparent synergy that has existed between the managerial and the fundamentalist-type discourses. I will demonstrate that while the official rhetoric of the CEO was primarily managerial, the underlying discourse was mostly of religious extremism.

I will end the chapter with a vignette that follows the route and turbulences of one new policy whereby ideological and economic forces interacted to create a new tradition, and in the process marginalised the social role of the schools in the community.

'In hindsight it had to happen'[1]

The evidence suggests that in the face of the huge financial crisis, the stakeholders tended to view the restructuring as driven primarily by an economic/financial logic. It was understood that drastic measures and strict financial discipline had to be introduced in order to save the schools from financial collapse. The following teacher's voice represents this view:

> I think it was essential in terms of finance. I mean the school was closing, and it's no use saying somebody would have saved us. Nobody was. And in my understanding, which might be correct or incorrect, this was the only way that the donors were interested in giving under certain conditions, and the conditions were that [the CEO] would come in. And I think in terms of the fact that we all still have jobs – that had to be. You know, I think it was a 'have to' situation … And I think because also, the community in general was very tired of money coming in and disappearing. And of people getting subsidies who maybe didn't deserve subsidies. Nobody was accountable for the amount of money that was coming in to the school, and that Board needed a shake-up – it needed it. Of course it's affected everything beyond the Board, but it needed it.[2]

There was a sense that the restructuring was long overdue and that it was necessary in order to *'clear out the decay and debris that had been there for so many years'*.[3]

> The system went too long twenty years ago. And it only became obvious – and tragic it was, when the cash began to run out. Now the cure is almost worse than the disease, because to cure something that is so old, you have to cut away good and bad and all sorts of things until you get to a point that you start re-growing again and you bring up fresh roots.[4]

Stakeholders at large maintained that the restructuring had to happen because the schools did not run like a business. In order to survive, schools need to change and adopt business-like practices. However, the data analysis reveals diverse responses to the question: *'What do you mean by "school should run like a business"?'* For one respondent it was all about *'effectiveness and efficiency'*.[5] A certain lay leader conceded, but was unable to describe, what would be different in the schools once they would be managed *'along business-like lines'*. Eventually, he maintained that

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[1] Other stakeholder, 10 January 2001. [Document 7:72 (1485). Codes: Restructuring - was good for the system].
[2] Teacher, 24 October 2002. [Document 49:4 (198:219). Codes: Understanding - financial].
[3] Teacher, 30 July 2002. [Document 48:13 (220:225). Codes: Restructuring - was good for the system].
[4] Community leader, 18 July 2002. [Document 23:18 (360:367). Codes: CEO - throw away the past; Restructuring - was good for the system].
[5] Other stakeholder, 15 April 2003. [Document 71:20 (567:578). Codes: School - as business].

'it's difficult to get into specifics, but it wasn't an efficient system'[6] – thereby equating business with efficiency.

The CEO's understanding of the concept included the outsourcing of services, creating small cost centres, introducing a good auditing system that could follow costs and expenses, strict control over expenditure and over the pupil:teacher ratio, better use of human capital, etc. There were also ways in which the Board could market services to the schools:

> Learning from business … I'm giving you an example of not continuing to employ more cleaners, but to either outsource, or to create a new company and to place all of those people within it, and to get into business. So in other words, there are ways of creating independence and being able to measure the cost of items – by outsourcing for expensive schools.[7]

One manager agreed that schools needed to *'run according to proper business controls'* in order to survive. Business people are therefore necessary to see *'to the business side of things'* but they should not involve themselves with the educational side.[8] Another manager likewise did not reject the idea that schools should be run like a business but maintained that this model was suitable for private for-profit schools and not for community schools that subsidise a significant number of pupils:

> You cannot run a place like this strictly on business lines. I just don't see that. You can do that if you run a [private] college, it's designed for that, but when you are talking about a community-type school, you can't do it.[9]

The teacher voice quoted below interprets the notion "school as business" as more control and contractual relationships among stakeholders. In the following quotation she vaguely described the shift from internal accountability to external accountability:

> Also he has tried to make it more of a business-like school, you know where you have a contract and the kids, they don't sign it but they get a code of conduct, so it is like they have a business role and you have a business role … You are more accountable for what you do. Whereas you have always been accountable, but nobody has ever really said anything, now it has been made very obvious, not in writing, but very obvious, that you can be called to a disciplinary hearing if you don't stay within the rules.[10]

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[6] Manco member, 5 August 2002. [Document 16:10 (185:193). Codes: Reason - mismanagement; School - as business].

[7] Recorded consultation with the CEO, May 2001. [Document 20:17 (350:364). Codes: CEO - Managerial discourse; School - as business].

[8] Manager, 26 June 2002. [Document 28:31 (912:927). Codes: School - as business].

[9] Manager, 11 March 2003. [Document 68:49 (1684:1705). Codes: School - as business].

[10] Teacher, 26 May 2002. [Document 8:9 (218:242). Codes: School - as business].

Another teacher voice suggested that the problem with the schools was *'total mismanagement'* as they did not *'run as a business, it was much more compassionate and much more caring in those days'.*[11] She thus equates inefficiency and mismanagement with caring and compassion.

It was acknowledged that some elements within the process were good for the system. While there was a tacit understanding that the ruthless and rather chaotic manner in which changes were implemented could negate the potential good of the restructuring, there was also the nagging feeling that *'if one really wants to bring about harsh change, then maybe the only way to do it … is to do it harshly and to demonstrate the harshness by just throwing everyone out and destabilising the whole thing'.*[12] One teacher commented likewise:

> You needed a ruthless person, to be perfectly frank, to remove certain people. I don't know whether he's removed the right people, I honestly can't say. But he needed to remove certain "dead wood", if you want to say – especially at – I don't know at what sort of level – a teaching level – where there was an over-abundance of teachers in certain departments ... .[13]

In teachers' perceptions the "dead wood" and the redundancy were mostly at "other" schools or in "other" departments, but not their own, even though some teachers did admit that they could have had a *'heavier load'.*[14]

It is safe to say that the initial consensus was that the restructuring was a necessary, short-term harsh action that would sort out the organisation and put it on the right track; that is, business-like lines. Subsequently, a number of stakeholders referred to the CEO as a henchman. It was expected that his engagement would be *'a short- to medium-term contract of two to three years to turn around the institution, put it on a sound financial footing, put proper systems in place where they were not in place and then to advertise for a permanent CEO'.*[15] This perception was, however, changed when stakeholders sensed that *'he's stuck, and he's going to stay here for as long as he can and get as much out of the system as he can'.*[16]

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[11] Manager, 25 June 2002. [Document 17:14 (493:496). Codes: School - as business].

[12] Other stakeholder, 7 February 2002. [Document 7:74 (1511:1518). Codes: Restructuring - crisis management].

[13] Other stakeholder, 4 November 2002. [Document 19:34 (585:595). Codes: Process - the retrenchment process].

[14] Teacher, 14 April 2002. [Document 13:39 (990:1008). Codes: Teachers - not working hard enough].

[15] Lay leader, 16 July 2002. [Document 26:28 (566:579). Codes: Restructuring - expectation].

[16] Manager, 16 October 2002. [Document 21:67 (1154:1163). Codes: CEO – Henchman; CEO - Motivation for taking the job].

The perception that the restructuring was unavoidable, and that this was the only way to save the schools, persisted in spite of a growing realisation that things were not going the way they should:

> I'm not convinced we did the right thing. I think we did the only thing we could do when we did it, but I'm not sure it was the right thing.[17]

> He saved Jewish education and for that you have got to give him [credit]. He saved it because the banks would have closed us down … That is it. What is he saving it for − what is his ulterior motive for what he is saving it for − if everything in the past was no good?[18]

Significantly, only one response to the question *'What is your understanding of the restructuring?'* dealt with the "bigger picture"; that it, viewing the restructuring as a process that had to happen considering the changes in South Africa. The respondent maintained that this process would be remembered as the turning point whereby South African Jews began to adapt to the new social, political and economic order. This voice also expresses the notion of "no choice". The "bigger picture" – that is, the South African context – is perceived as unfriendly and unsupportive:

> The community has so long been accustomed to being treated as a special minority because the South African government before 1994 was a government of the minority. Now it has become a government of the majority. The Jewish schools will have to become accustomed to the fact that the minorities are not going to be treated specially – they are going to have to fend for themselves, and I think they are slowly getting accustomed to that. If I had to look at the overall picture and if I had looked twenty years ahead of me and looked back on this whole [the CEO] saga, its going to be the moment in time when the King David Schools had to accommodate themselves to the reality of the new South Africa – that they were not going to get any help except from themselves. Either they survived on their own or they went down. That is going to be how the history books are going to be written, you see. And I think that to the extent that they are able to get over the financial crisis and concentrate on the provision of better education, the better it will be.[19]

The evidence so far demonstrates that the stakeholders generally concurred that the restructuring had to happen because the schools were not managed like a business, even though a number of respondents pointed to the complexity of the term. Nevertheless, the business-like practice of bringing in a "henchman to clean up" the institution was accepted uncritically as the only path to organisational recovery. Once this solution was identified there were no attempts to open other "windows of

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[17] Honorary officer, 28 October 2002. [Document 30:22 (758:761). Codes: Restructuring - had to happen].

[18] Manager, 26 May 2002. [Document 11:145 (670:680). Codes: Restructuring - hidden agenda].

[19] Community leader, 18 July 2002. [Document, 23:31 (679:700). Codes: Restructuring - part of a bigger change in SA].

opportunity" and to look for more creative solutions. The expectations were that the solution must work and that stakeholders must "get over it" and adapt. Even those who suspected that the restructuring was not going the way it should have, did not reject the application of business practices to the institution.

The narrative also brings to the fore the overarching feelings of isolation and disempowerment in the community. This is gleaned from phrases such as "nobody was going to save us" and we "have to fend for ourselves". It was therefore perceived that in this new context that is hostile towards independent schools, it was necessary to take some drastic measures that might not have been contemplated under different circumstances. The schools had to accept the necessity and the inevitability of the proposed market-led change. The market was perceived as the only mechanism to provide the community with the certainty and security it desired. The community schools had to either learn to swim in this harsh business-like context, or else they would sink.

'This restructuring didn't happen the way we were promised it was going to happen'[20]

When taking up his a position as the head of the organisation, the CEO announced his intention to shape *'a new VISION for the Board and its structures'* (emphasis in the original).[21] The theme of his introductory letter to the staff was that of progress and change in order to compete in the new global economy:

> We are all aware that we live in a world that is rapidly changing, and we need to ask ourselves whether we as an organisation have sufficiently responded to that change. We live in an IT revolution, but have we increased our skills sufficiently to honestly claim that we have not only kept up with the times, but that we are leaders in the knowledge revolution?[22]

The CEO continued to articulate the need to *'make sure that the cost structure of every unit is optimum, both in its use of human capital and its other expenditure'*. In this first communication from the CEO, the tone was clearly managerial. There was no mention of Jewish ethos or community needs, but rather a vision of a *'financially viable organisation that will offer the best service and education in the attainment of our goals'*.

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[20] Manager, 2 July 2002. [Document 6:95 (221:265). Codes: Restructuring - expectation].
[21] Memo from [the CEO] to all members of staff, 7 May 2001.
[22] Ibid.

Based on this managerial discourse, and the announcement that the organisation would become *'lean and mean'*,[23] there were expectations that the system would be reorganised and everyone would have a more defined role within it. It was anticipated that there would be more expertise in the schools, with a smaller yet more efficient staff complement. Doubts quickly crept in, however, as expectations did not materialise. One respondent became quite frustrated:

> … because we expected all these changes and nothing happened. We had no idea. We thought: here is a guy who is going to tell you what to do – and this was very nice, and we will clear up all the goalposts. But when it came to the crunch, we are basically running as we always have.[24]

One manager initially welcomed the restructuring, as she was aware that there were unproductive members of staff who had become a burden on the school community. She also became disappointed, as she perceived that the restructuring did not necessarily target those individuals but rather depleted the system of those who were vital for its existence. The promised "retention of skills" did not take place. She perceived the restructuring as an attack on both teachers and professionalism:

> At first I understood the restructuring to be something that was going to improve the finances, and for me that was okay because we really were in trouble. Yes, at first I understood the concept of, you know – let's get rid of the dead wood. But the dead wood didn't stop there. You were now getting right down to the roots and the basic shoots, and depleting, and depleting, and depleting the staff of vital people … I don't know, this restructuring didn't happen the way we were promised it was going to happen. And the unaccountability for respect for the teaching fraternity, is for me the most horrendous thing. There is no respect. We are just common workers.[25]

One respondent summed it up when he maintained that while *'there was a need for tightening up … the importance of economics has over-ridden to a large extent the importance of the academics and the ethos of the Jewish day school'*.[26]

As the restructuring proceeded and the CEO alienated many of the school executives, principals, teachers, parents as well as Board members, the process became less understood and less supported. The school community was divided among stakeholders who supported both the ends and means of the restructuring; stakeholders who were able to separate the two and thus support what was being done

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[23] CEO address to the staff of the SABJE, 25 April 2001.

[24] Manager, 21 April 2002. [Document 4:100 (912:917). Codes: Restructuring - expectation - but nothing happened].

[25] Manager, 2 July 2002. [Document 6:95 (221:265). Codes: Understanding - attack teachers and professionalism].

[26] Manager, 26 August 2002. [Document 31:40 (46:73). Codes: Understanding - not clear whether financial or educational].

while condoning the way in which it was done;[27] and stakeholders who rejected both ends and means and perceived the restructuring as an attack on the educational achievements and the symbols of the schools. The most common feeling was that of confusion and lack of knowledge or understanding of the restructuring. In the following excerpt, one manager expressed these feelings as she tries to make sense of the trajectory and the meaning of the change:

> Nobody really knows and understands what this person is really meaning to do. What is his vision, what he is trying to achieve, what is the aim? In the beginning he was busy with the financial aspect of the school. We understood, they brought in a financial genius who will correct the financial deficit. Suddenly, we don't understand why he enters the educational side, and now he is trying to change the uniform; we don't know what will be the next stage. And I don't understand; we did not have educational problems, we did not have problem with syllabi, so why is he interfering?[28]

It seemed feasible that the restructuring had lost its legitimacy when stakeholders could no longer follow its logic:

> For example – he organised the finances and so on, but why he has to interfere in the way things are running, and he doesn't know whether they are running well or not – he just wants a change. And that's "change for change's sake" … I said, you do not fix something that is not broken.[29]

Similar to the respondent quoted below, some stakeholders became suspicious as to whether the financial crisis was real or "manufactured" in order to institute certain changes at the schools:

> I don't know, and I think that nobody knows, to what extent the financial situation is bad, if it was really as bad as the teachers were told – because, every week they told us, and put us under pressure and they expected to receive our sympathy so they "fabricated" numbers. One day it was 30 the next 31 and then they even got to R40 million … and then the [vice chairperson] came – she said that there was a problem but now it is much better and that there are now donors and that they solved the financial problems. It seemed very strange to us that they managed to do it so quickly. Nobody knows, they say that the donors are anonymous. There are many rumours, but it seems that the situation is not so bad, because there are new car parks and shades for the teachers' cars … they are investing money. But when there is a bad financial position you don't invest money. Rumours are spreading, and then you hear that some of the rumours are true. In most cases they are true but you don't know, you are not told anything and you don't really know what is happening. There is a feeling that there is a hidden agenda.[30]

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[27] For example: Manager, 25 June 2002. [Document 17:21 (556:560). Codes: CEO - I like what he is doing, I don't like the way].

[28] Manager, 14 May 2002. [Document 3:110 (781:792). Codes: Understanding - not clear whether financial or educational; restructuring – no clear map of change].

[29] Other stakeholder, 4 November 2002. [Document 19:12 (329:346). Codes: CEO - should only be involved in finance].

[30] Manager, 14 May 2002. [Document 3:213 (44:77). Codes: Financial debt - figures - real or fabrication].

The investment in car parks described in Chapter 2 as the "glossification" of the schools was justified by stakeholders who maintained that it was important to continue with capital expenditure. This spending was, however, objected to by teachers who were *'left wondering why some teacher was replaced but her year's salary was spent on carports'*.[31]

Stakeholders became even more uncertain about the financial crisis when a few months into the process there were talks about building a new high school in Sandton and a new middle school at the Linksfield campus:

> I'm not sure I understand it. I understood that the restructuring was to worry about the finances. But to create a middle school now … you have to have another principal. You have to have more staff. You have to have separate facilities, and I'm not sure that it is addressing the finances.[32]

Many parents did not take much notice of the restructuring until it affected their children's teachers or somebody that they knew personally. In June 2001, amid much commotion and resistance from the schools' staff, the CEO addressed the parents in order to convince them as to the necessity of the harsh measures. His charisma and oratory skills, his command of the managerial discourse and the promises of efficiency, accountability and responsiveness to parents as customers, appealed to the parents who accepted some of the disturbances in the education of their children as temporary and unfortunate. For example, in the following citation the respondent understood the restructuring in terms of the Hebrew teachers not working enough hours and teachers having too many privileges. Once these problems would be settled, the respondent believed that the schools would return to their routine:

> I just believed that, yes it would be traumatic for the first six months, because it was a lot of extra work for a Hebrew teacher – but at the end of the day a lot of it was the Hebrew. A lot of the issue was the Hebrew. And also I felt that we … would get past this period where teachers were taking long leave, but once we had passed it, then we would just carry on as normal.[33]

Another parent disagreed. In her response she did not trust a restructuring that would profit the CEO, thereby encouraging him to make some changes that were possibly not educationally sound:

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[31] Teacher, 27 May 2002. [Document 14:39 (735:749). Codes: Costs - new - carports and parking].
[32] Teacher, 30 July 2002. [Document 48:18 (319:332). Codes: Understanding - not clear whether financial or educational].
[33] Parent, 15 October 2002. [Document 44:18 (694:709). Codes: Understanding - Hebrew has been restructured].

> I have a problem with the Board's changing attitude. [The CEO] believes [that] the school should be a profit-making organisation. I think it's good to make a profit that you then plough back into the school, but I don't believe the profit must be used then to pay a specific individual, whoever he may be. I don't think that what [the CEO] did, someone else may have done differently if they would have been brought in. I think that he – what really affected us as parents – is that when he started this "taking your long leave" story – that classrooms were disrupted and our children were unhappy. When he started meddling with those issues instead of saying: 'Let me look where I can fix up – where I can save money, without disrupting education …'.[34]

Based on the managerial discourse of decentralisation and responsiveness to parents' needs there were also expectations among parents of substantive change in the schools. One parent hoped that with the restructuring the Board would be decentralised and the schools as well as the parents would be empowered. However, this did not happen. In the following extract the parent voice distinguished between cost cutting and restructuring. While the former took place quite callously, the latter did not happen:

> I think what happened was – there was major financial mismanagement. There are significant allegations going around about negligence through to corruption kind of things. But I think all that vested itself ultimately in a financial crisis. So two or three members of the Board sat up and said: 'Crisis! We've got to do something'. They appointed a new CEO whose first task was to save the system financially. And I think that has probably been relatively successful. … We are in a much more optimistic state now than we were eighteen months ago, two years ago. And that's really the only restructuring that's taken place. I don't mean "only" dismissively. There has not yet been any restructuring in terms of – What is the role of the Board? How do you decentralise management? What should be decentralised? What should be brought to the centre? Now that maybe hopefully is just a process, because if you are in a crisis, you pull in everything to the centre – sort out what you can, and then start looking at other things.[35]

Another parent likewise maintained that there was no substantive change in the educational aspects of the schools, and that the restructuring might have changed those in control but had not permeated the schools. According to him the schools were continuing as usual but with fewer teachers:

> What restructuring? … To my mind, you've got a new CEO, okay. But basically, that's not restructuring … It's the same teacher body that continues. The fact that we had too many teachers … was bad financial governance. And so that's a rationalisation of costs. It's nothing to do with the education. It's not as though the kids are getting taught less. It's just that there were too many teachers and they had too many free periods. That's nothing to do with the teaching … I do not perceive that there's been anything radical. We had a bad period when the teachers were

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[34] Parent, 14 August 2002. [Document 40:62 (1181:1196). Codes: Understanding - not clear whether financial or educational].
[35] Parent, 21 October 2002. [Document 43:28 (725:738). Codes: Understanding - financial].

> demoralised because of [the CEO] business, and it wasn't good for the school. I think they've recovered and so I don't see anything … .[36]

In summary, while there was general consensus that the restructuring was necessary, the process did not happen the way stakeholders thought it would. The discourse of business was generally accepted, but it was expected that changes along these lines could be implemented without disturbing the educational services of the schools. The narrative begins to point towards a definite gap between intention and implementation, rhetoric and practice. In spite of the managerial discourse and its promise of order and certainty, the stakeholders experienced the process as a pure cost-cutting exercise, with very little impact on either the structures or the culture of the schools. Subsequently, there was no confidence as to whether the restructuring was addressing the financial crisis and the perceived causes of it, such as the structure of the Board. The responses reveal a strong sense of "being in the dark" – not knowing what it was all about – which eventually led to a lack of trust and a lack of cooperation with the process. One can also begin to detect a division whereby the school community is referred to as "we", and the CEO is referred to as "he". The lay leaders who brought the CEO in were referred to as "they". This resulted in the polarisation of the school community; a repeated theme that emerges from the data.

The research suggests that there must be a consensus among key stakeholders on the needs for and the goals of change (Reimer & McGinn, 1997). It is clear that if stakeholders do not understand why change is necessary, implementation could be problematic. In the restructuring of the Jewish community schools there was some consensus about the financial crisis, and people were ready to accept the changes. Yet, there was no consensus about failure in other aspects of the schools, such as their educational achievements or their ethos. The excellent matriculation exam results were often brought up as an example of the high quality of education. Even though teachers were aware that there were many educational aspects that needed to be improved regarding the culture of learning and teaching, the prevalent perception was that the restructuring did not affect those areas and that the CEO was actually fixing what did not need to be fixed. When the CEO began to interfere with the educational

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[36] Parent, 31 January 2003. [Document 63:46 (1123:1147). Codes: Understanding - nothing has changed].

services and with the ethos of the schools he therefore lost the support of the teachers. They began to view the restructuring as a "change for change's sake".

'He is like a bull in a China shop'[37]

The only word that can describe the atmosphere in the schools at the beginning of the restructuring process was *chaos*:

> … there was like – it's very, very difficult to describe to you what happened then. There was almost like an explosion – an atomic bomb. And almost with indecent haste [the CEO] was foisted on us.[38]

This chaos was aggravated by the fact that most of the restructuring plans were revealed to stakeholders via messengers or rumours, which created uncertainty and suspicion. There was a sense that the CEO did not understand the system, did not understand what Jewish education was all about, did not know what was happening at the schools and did not understand the process of educational change. This resulted in conflicting messages, in impulsive decisions being made and reversed, and in policies being changed, terminated or arbitrarily applied. The following examples will demonstrate some of the disorder that was created by the various attempts to put new structures in the schools and the ad-hoc manner in which this was done. The variety of the responses is indicative of the spectrum of the intended changes:

> We got all these mixed versions of what we were allowed and what we weren't allowed … so I think the messages we were getting were not accurate.[39]

> A million changes at the same time, no logic, even though some of the decisions are very good, even brilliant.[40]

> He promised me last year that he's going to bring modern computers and more modern programmes, more IT, and all these kinds of things. He hasn't delivered on any of those areas. We are still waiting for the comprehension programme.[41]

> You know, everyone thinks – what is he going to do next? You know, what's next? But at the same time people always laugh. You know he does things impulsively. He put up that wall … the wall was put up and nothing else. He seems to be the kind of person who acts impulsively and never sees it through.[42]

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[37] Lay leader, 29 July 2002. [Document 47:3 (230). Codes: CEO - does not understand the system].
[38] Honorary officer, 15 August 2002. [Document 33:9 (325:348). Codes: Process - employing CEO].
[39] Teacher, 21 February 2002. [Document 1:96 (422:426). Codes: Restructuring - no clear map of change].
[40] Manager, 5 August 2002. [Document 9:17 (234:235). Codes: Restructuring - no clear map of change].
[41] Parent, 14 August 2002. [Document 40:45 (854:859). Codes: CEO - does not keep promises].
[42] Other stakeholder, 12 July 2002. [Document 24:78 (453:462). Codes: CEO - impulsivity].

[The vice-chairperson] stood up at the [PTA] meeting and she said: 'You guys don't understand [the CEO]. I understand him because I am like him. He goes to bed at night. He has an idea in the middle of the night. He jumps out of bed in the morning. He says – I'm going to implement my idea …'. You know, I don't think she realised what she said. So that's the way he behaves.[43]

He makes up his mind and then people fight him on it and then he changes … like the remedial. The kids have got to be withdrawn, and then included. Then they are withdrawn but parents pay for it. You know, all this nonsense.[44]

Everybody was going to have to go through an interview to assess what they had to offer to the school … it was like a job interview … it was degrading and it was really terrible. At one point it felt like we were all vying with each other to hang on to the positions. … Then it was only going to be for the Hebrew staff and then the whole staff, it caused so much fuss and so much confusion and it just never happened.[45]

And then he got involved in the primary schools. No – then he came to talk to us [high school] about the leave and doing away with leave and that. And then he got involved with the primary school ... And then the high school was left alone, and then all of a sudden – boom – like five teachers get letters that they've got to go. They are 60 and they have got to leave. And yet other 60-year-olds are there. You know, it's very strange.[46]

He often has to retract because he does things and then they are not finding favour, and there's a lot of criticism coming from all quarters. ... He doesn't seem to think that he's lost face. … I mean he goes as far as sending out circulars when these things are in black and white, and then two weeks later because there's a huge uproar about some of these things, it suddenly sort of dies a natural death – he kind of retracts and postpones, or he says – well, right, we'll leave things as they are at the moment.[47]

In his eagerness to change every aspect of the organisation all at once the CEO was jumping from one issue to another, from one school to another and from one decision to another without following anything through. The teachers were trying to keep some sanity in this chaos by finding meaning for being there and persevering with their job expectations:

We don't know what is going on, we don't know what the next day will bring. No, all there is, is confusion, badly delivered new edicts, which are then cancelled or changed or just get lost somewhere along the line. Much of it has been total chaos and what we have had to do as members of staff is just remember that our first loyalty is to the kids, and to just try and get on with our roles as teachers.[48]

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[43] Parent, 14 August 2002. [Document 40:40 (796:808). Codes: CEO - impulsivity].
[44] Other stakeholder, 23 May 2002. [Document 12:149 (1720:1726). Codes: CEO - reversing decisions].
[45] Teacher, 27 May 2002. [Document 14:58 (392:412). Codes: CEO - reversing decisions].
[46] Other stakeholder, 23 May 2002. [Document 12:96 (1091:1105). Codes: Restructuring - no clear map of change; Teachers - learning about changes].
[47] Manager, 8 October 2002. [Document 34:6 (168:182). Codes: CEO - reversing decisions].
[48] Teacher, 27 May 2002. [Document 14:36 (644:671). Codes: Restructuring - no clear map of change].

It will be wrong to assume that everyone resisted a broad and all-embracing change process. There were those who clearly agreed that the system was no good and needed to be rebuilt from scratch. The stakeholders' "illogical" resistance to such thinking was explained again by people's resistance to change and by the psyche of the Jewish community. Yet even this next respondent seemed to understand that the change was too broad, too quick and not always implemented in the right way.

> I understand him, because he's a man of change. I'm not saying always a diplomatic change – but he's a man of change. And he would like to come in and open up every little corner and change it. But they don't want it! So be it. In a sentence – I think it's very sad. I think it's very, very sad that our people won't accept change ... There clearly has to be a 'slowdown' of change. The time clock has to be different now, because Jews don't like change. And parents don't like change. And parents are saying: 'King David's fine. We have good results. Stop analysing each and every aspect of the system'. And that is now what we have told [the CEO]. We've said to him: 'Stop – wooo. Nothing. Do nothing. Forget about a middle school'.[49]

The eagerness to change all at once was explained by the short-term character of the CEO's engagement, which made him go for quick fixes that would target visible exterior elements within the system without a parallel deep cultural change:

> [I thought] that initially he would – before he makes any major changes – he would talk to a lot of people – get some feedback – find out how things operated before, and where they went wrong – because it wasn't always good – it was bad times. We did lots of bad things, I am sure at all stages – to get a feel of it and then begin to – but I think the mandate given was 'get it right within a year'. In other words, see to it – let me put it this way – I think the mandate was 'see to it that things happen quickly so then we can say to the banks – we are on track, or this is our projected plan. We will save so much this year'. I think that was the mandate, and maybe that's why he took such drastic steps and he targeted areas which were easy areas to target.[50]

Once stakeholders got used to the mixed messages, they somehow learned to ignore them. It was therefore perceived that in spite of all the emotions, rumours, declarations of intent and articulations of plans, very little change was experienced at the school level. The prevalent perception was that *'despite all talk, very little has changed'*.[51] Some teachers adapted to their increased workloads, while other teachers' loads were not changed much. Managers maintained that they were investing their time in *'damage control'*.[52] The following teacher voice indicates that the teacher was

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[49] Honorary officer, 20 August 2002. [Document 41:36 (902:915). Codes: CEO - approach to change; 41:9 (249:258); 41:48 (691:704) Codes: Restructuring went bad - who is to blame].

[50] Other stakeholder, 15 July 2002. [Document 25:35 (839:857). Codes: Restructuring - quick fix].

[51] Manager, 17 March 2003. [Document 69:16 (480:482). Codes: Restructuring - no change at school level].

[52] Manager, 16 October 2002. [Document 21:9 (171:190). Codes: Restructuring - no clear map of change].

quite aware of intended changes, but that they had no meaning for her as long as they did not disturb her or her own children's routine. She seemed to separate rumours and intentions from actual changes and learned to react to only those changes that actually took place:

> Quite honestly … I don't see anything that's changed. I know that there are plans to restructure the whole education system, but to be quite honest with you, I see nothing. For me, it's exactly the same … like the middle schools, you see my children are not really involved … With regard to any other restructuring – for me, nothing has changed. Definitely nothing. It's exactly the same … I have heard that the Board has been restructured. I mean, people have been retrenched and that they are basically working on a skeleton staff. But more than that, I have no information whatsoever. None at all … I've heard that the [teaching of] Hebrew is going to be changed; *Chumash* (Bible) is going to be taught differently to a language – they are going to have other teachers teaching those subjects. It's basically what you hear. But I haven't seen anything concrete at the moment … There are a lot of rumours.[53]

The narrative has so far described a clearly unsuccessful change process wherein one person was trying to take on, by himself, a comprehensive restructuring with no buy-in from the system. It was experienced as a restructuring without direction. Subsequently, the school staff denied that any change had happened at all. It was perceived as "a storm in a tea cup".

Research maintains that new leaders sometimes wilfully create chaos – some kind of *manufactured uncertainty* – in order to arouse panic, to set pretexts for their policy interventions and to keep educators and everyone else off balance (Hargreaves et al, 1998:5). And indeed there was a perception that the chaos was created by design in order to *'destabilise everybody, so that he could do what he wants to do and take control ...'*.[54] It was envisaged that once control was achieved the turmoil would settle down. To a certain extent this was achieved. In spite of all the disorder there was the perception that the CEO was in control and that the system would collapse completely if he was to leave. One manager elaborated:

> Because I know this last time – I don't know if you know about it in the high school PTA … and people were saying he's really in trouble now, and he's going to have to leave. And my panic was that he would actually get angry and fed up and say – look, I've tried my best, and just go. And I think then it would be a disaster, because he is holding the place together as much as people think that everything's falling apart. He is holding the place together. And he's got a very tight control. … I really do … and I even spoke to one of the teachers. She thought he must go, and it's ridiculous – and I said, 'Who will take his place?' I actually said that. And she said, 'Oh, there are

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[53] Teacher, 3 July 2002. [Document 18:7 (215:235). Codes: Understanding - nothing has changed; (243:247) Codes: Understanding - Hebrew has been restructured].
[54] Manager, 15 October 2002. [Document 39:26 (931:947). Codes: Process - destabilising the system].

> people like – there's one father who is an attorney but he's a big businessman'. And I said, 'Ah, he wouldn't be interested … the fact that he stood up at the PTA and complained, doesn't mean to say he is going to be able to run the organisation. And he won't give up his business to come and run the organisation'. And then she said, 'Oh [this principal], or [that principal]'. I mean they were throwing out names that were ridiculous.[55]

In the above quotation the respondent articulated what Fullan terms "frustrated or despondent dependency" (2001:1), which usually comes after an episodic improvement by a charismatic and coercive leader. The following respondent likewise expressed this feeling of disempowerment and isolation. She also described the breakdown of trust among school staff – one of the adverse consequences of the restructuring:

> I'm fighting a losing battle. Who do you go and talk to. I don't talk to my boss. She's scared for her own life. You don't know how things are twisted around. You don't know even who to talk to in the staff room. Everybody's clever. They are all looking after themselves.[56]

Another respondent who was in academic and managerial positions for many years and who was hurt to see his life's work being destroyed, expressed a similar sense of resignation:

> What can I do? "Cometh the hour, cometh the man". You go through stages in an institution, and from a personal level you worked at something – you've contributed as best you can to it. You think you've done a reasonable job. There's a new era. There are changes. You can't castigate yourself for what's happening. You are forgotten. You're history. And that's natural – that's the way it should be … Maybe that's a natural event and times have changed – different people are running the Board. Different thinking.[57]

To summarise, the narrative reveals that the restructuring was perceived as a quick fix owing to the CEO's mandate and his intention to demonstrate visible changes in a short space of time. This resulted in ad-hoc, impulsive changes before any attempt was made to understand the culture of the organisation and the context of change. In the chaos that was created stakeholders exhibited various emotions, such as denial (nothing really changed), fear of the future (it could be worse if the CEO left), defeat and disempowerment (what can I do?), isolation and withdrawal (who can you talk to?) polarisation and suspicion (they are all looking after themselves). All these were negative emotions that made change a threatening and unpleasant experience. The

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[55] Manager, 11 July 2002. [Document 29:17 (682:738). Codes: CEO - holding the system together].
[56] Teacher, 9 January 2003. [Document 53:52 (926:950). Codes: Teachers - compliance].
[57] Other stakeholder, 15 July 2002. [Document, 25:73 (1250:1270). Codes: History - institution memory].

parent voice below connected these negative feelings to the insecurities already felt by the school community:

> It was a wonderful school and there wasn't ever a threat of it closing. There wasn't ever a threat that your grandchildren weren't going to go to the school. And now there's – I don't like living … we live in insecure, uncertain times anyway, with all this violence, and I feel particularly vulnerable having been through a terrible incident [hijacking] myself now – that now that my daughter's schooling career and future is at stake – so yes, I do feel very, very insecure and I think it's given everybody the jitters.[58]

'We will become more Jewish, if you know what I mean by more Jewish'[59]

The CEO declared his intention to make the schools more Jewish, both publicly and privately. For him the financial crisis was an opportunity to change the ethos of the schools:

> I think even a secular English-speaking headmaster is a problem in terms of the ethos … I am saying in terms of the restructuring, the restructuring will not be haphazard on the basis of just saving money. I think together with the saving of money, which is necessary, we have to move closer towards the ethos of the schools in terms of senior positions. So you take advantage of the restructuring for money, to bring about what we are really trying to achieve.[60]

Though the CEO agreed to ensure the *'perpetuation of the ethos'*[61] of the schools he adopted the rhetoric that he was not going to change the ethos but only to "intensify" it. He believed that there was a need to reinforce Jewish values since *'we became slack in their observance'*.[62] He argued that major events such as September 11 and the Durban anti-racism conference were there to remind the community of the importance of Jewish education:

> The evil perpetrators have not wasted time to link the blame [of September 11] on the State of Israel and the Jewish people. The Durban anti-racism conference saw some of the most blatant anti-Semitic and racist activity that we have ever experienced, and on our doorstep. If we learn from history, denial and withdrawal are poor antidotes. Ignorance is no answer to the well-orchestrated and financed onslaught against us. More than ever we have an obligation to educate ourselves and our children with regard to Jewish values. If ever there was a time that the KD Schools needed to exist and inculcate these values, it is NOW. … *We need to stand proud of these values*. While others have adopted some of those values, many have corrupted them in trying to achieve their evil goals. (Emphasis in the original.)[63]

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[58] Teacher, 30 July 2002. [Document 48:29 (603:622). Codes: Insecurity].

[59] Manco member, 20 August 2002. [Document 41:37 (915). Codes: Impact - religious base - more impetus].

[60] Recorded consultation with the CEO, May 2002. [Document 20:150 (3021:3035). Codes: Restructuring - financial or ideological].

[61] Memorandum from the chairperson to all members of staff, 3 May 2001.

[62] New CEO for SABJE. *Davidian Star*, July 2001.

[63] From the desk of Allan Zulberg 22 October 2001.

To the sensitive ear, it was easy to detect an extremist undertone, whereby the "others" are "evil people" who had forsaken Jewish values. The spreading of fear and the feeling that "all are against us" had been used to gather support for the restructuring. In the sentences that followed the above quotation, the *'evil goals'* were identified as the goals of those stakeholders who circulated damaging *'false rumours'* blaming the CEO for not communicating with them.

Stakeholders' perceptions of the ideological restructuring were diverse. While one interviewee observed no change and that *'the school is probably as irreligious as it always was'*,[64] another respondent was *'disturbed'* to observe a *'religious influence in the* charedi *side of things…'*.[65]

It is feasible that the Hebrew teachers felt the ideological restructuring in a more acute way at the beginning, as the subject was perceived to have lost its privileged status at the schools. As alluded to in Chapter 3, based on the *charedi* approach to the language, Hebrew was considered as a secular language in the same category as English or Afrikaans. The teaching hours had been cut, teachers were retrenched and some had resigned sensing their changed status and increased workloads. Moreover, central coordination was devolved to the schools, and the heads of the Hebrew departments at the various primary schools were often referred to as the heads of Jewish Studies. In addition, the CEO objected to some of the Hebrew textbooks that had previously been used in the system, describing them as a "desecration of God" and was trying to introduce more religiously orientated readers. The *Ulpan* programme to Israel was terminated as soon as the CEO took office, and the high school pupils were given the choice to decide whether they would take Hebrew or Jewish Studies for matric. There was also an attack on the teachers' level of observance. It was intimated that only observant teachers should lead the prayer sessions and teach the Bible. This, however, did not materialise for lack of suitable staff proficient enough in the Hebrew language. The new principal of Linksfield High School,[66] speaking about the challenges facing Hebrew Studies expressed a similar attitude towards the Hebrew teachers when he remarked:

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[64] Manco member, 5 August 2002. [Document 16:35 (568:576). Codes: Impact - religious base - no change].

[65] Community leader, 8 May 2002. [Document 10:77 (464:470). Codes: Impact - religious base - more impetus].

[66] At the end of 2000, the principal of KDLH retired. His deputy took over the position at the insistence of the executive staff at the school.

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> We have few observant teachers and with the way things are going we cannot be choosers. I do not see how we can permit non-observant Hebrew teaches to comment on Judaism and Jewish way of life.[67]

As already mentioned in the Chapter 3, this was not a new way of thinking, but with the restructuring it came into the open and into the consciousness of more stakeholders. It is also feasible that under this new regime the more religious stakeholders – such as the new principal of the high school – felt more comfortable expressing their own views, which they would have been reluctant to do in a less supportive context.

While cost cutting occurred in the Hebrew departments, the Jewish Studies departments experienced an injection of money.

> I feel that there is much change towards the religious side of the school, there is much emphasis on increasing the religious base. In one school he added young people to help with this, I don't know how efficient they are. In the high school he added three rabbis. I know that they are supposed to help … they are getting salaries, but we don't know where the money is coming from for it. That is why we don't know how bad the situation was when they were playing on our sympathy, and that is why I don't understand why they took out the people that they took out, and why they did not keep them here, but if there was a financial problem they could do a financial change … .[68]

It is for this reason that the next respondent viewed that change as dishonest and underhanded. She perceived the restructuring as the intention to change the ethos of the schools – namely, its broadly national-traditional stance – without making these intentions known. She was afraid that this change would alienate more parents who already thought that the schools had become too religious. She felt that her integrity had been compromised:

> I think he is hoodwinking the parents into believing that because of financial restraints he has had to cut the Hebrew [lessons and teachers]. But if he had to cut the Hebrew because of finances … then why is he intensifying *Limudei Kodesh* (sacred studies) … . So I think that he is doing a disservice to the public and that is what is worrying me because those people who wanted their children to have a religious education haven't got their children at King David. So if the restructuring is to make the school more religious then it is not fair, let's say, to the secular and to the ordinary South Africans who have no affiliation to religion and who are there for their children to get what they can't give them at home, but not to the extent that it becomes so rightwing that they are going to be uncomfortable with what their children are learning. As it is they were uncomfortable with Jewish Studies where we taught them about *Shabbat* and there was conflict, we brought conflict into the home, but now even more, and I am worried about that. I am happy on the one side that yes it is

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[67] Challenges facing Hebrew studies – Altshuler. *SA Jewish Report*, 11–18 April 2003.
[68] Manager, 14 May 2002. [Document 3:242 (825:840). Codes: New costs - campus rabbis; Restructuring - financial or ideological].

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going to be *frumer* (more religious), but if I look at the people who are buying into the system, I don't think he is being honest. … I feel uncomfortable; I feel it is not honest. I feel it is a dishonest restructuring; it is being blanketed as due to financial corruption, whatever you want to call it, he has had to do this.[69]

A secular teacher who observed the increase in the number of Jewish Studies lessons did not see it as an ideological change as it meant very little to her:

But I don't think it's ever been a religious school. And I don't think anything has changed … so they will have an extra Jewish Studies lesson. But I don't know the purpose of it. It's never been discussed or told to us, or … We've just been told next years there's going to be ... I think they have three Jewish Studies lessons this year – two this year and three next year, or three this year and four next year ... .[70]

Another teacher observed a change in the prayer sessions, but this also did not signify any ideological change for her. The lack of religious meaning that these voices reveal could also be an indication of the continued division between the secular teachers and those in charge of the Jewish curriculum at the schools, and the absence of a common goal:

I haven't seen anything yet. I know that for instance during prayers, whereas before you could perhaps do Hebrew lessons during prayers or if you were preparing for an inter-house day … but now you can't. Prayers are prayers are prayers. But otherwise [I] haven't seen anything else … Not really, not yet. But I am a secular teacher so I don't really know.[71]

In the different synagogues, rabbis who traditionally objected to the KD schools were rumoured to endorse the changes and to encourage their communities to support the schools. One *Ohr Sameach* rabbi suggested that it was an opportune time to change the religious base of the schools as the Johannesburg community had become more receptive to religiosity since everyone *'had a cousin or brother who has become* dati *(religious). It's become more a part of their life so they have become less adverse to it'*.[72] An Ultra Orthodox member of the *Yeshiva Maharsha* community expressed a more extreme view. For him, the restructuring of the schools meant their complete destruction, and for good reason:

KD was like a rotten and bent tree that has to be uprooted completely. A new tree must be planted.[73]

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[69] Manager, 26 May 2002. [Document 11:48 (440:456). Codes: Impact - religious base; Restructuring - dishonest].

[70] Teacher, 24 October 2002. [Document 49:34 (1241:1261). Codes: Impact - religious base].

[71] Teacher, 27 May 2002. [Document 14:35 (646:656). Codes: Impact - religious base].

[72] Other stakeholder, 11 March 2003. [Document 66:22 (60:64). Codes: Jewish community - receptive to religiosity].

[73] Journal entry, 3 July 2002. [Document 55:496 (5965:5987). Codes: Understanding - ideological].

Making the schools more religious in a community that is gradually turning to the "right" made some economic sense. This view is expressed in the next quotation whereby the respondent maintained that the competition with other Jewish day schools made this type of change necessary:

> I think what has happened in my view, is that the most noticeable change is the growth and the development of the schools on the right of the spectrum. But nevertheless they still represent a relatively small number. But their impact has been quite significant because in a sense they have moved everyone slightly more to the right, because that's the nature of competition.[74]

These voices clearly show that the restructuring of the Jewish day schools was closely monitored by the broader community, with either approval or dismay. As was mentioned in Chapter 3, the struggle over the ideology of the schools essentially represented the struggle over the future of the community. It seems, however, that the terrain of the conflict had shifted. It was no longer the old struggle between the national/Zionist/secular and the orthodox/traditional. There was no secular/Zionist/ national voice protest. The struggle was taking place along the traditional/orthodox-*charedi* continuum. The question was: How far could the community schools be pulled to the "right" without the parents resisting this change? Was the community ready to identify itself purely in terms of religion and lose its "imagined" identity as "broadly national-traditional"?

The proposed changes in the symbols and traditions of the schools, such as the uniform and the *Bat-Mitzvah* ceremony (to be discussed later), alerted the community to the ideological facet of the restructuring. Some viewed it negatively, some positively, and some with indifference. While it was generally accepted that the schools were becoming more religious following the transformation of the community, there was concern that fundamentalist elements would be reinforced through the use of deceitful means. There was a perception that *Ohr Sameach* had taken over the schools. One community leader who was not happy with the fact that the schools were becoming more religious, was comforted by the fact that *Ohr Sameach* is connected to the traditional Lithuanian *Mitnagdim* tradition. This meant that the schools would not become *chassidic*. This is indicative of his hope to maintain part of the narrative of the "imagined" Jewish community in South Africa, as described in Chapter 3, even if that had lost its original meaning:

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[74] Manager, 11 March 2003. [Document 68:1 (270:290). Codes: Understanding - ideological].

> [The CEO] would like to see [the schools] much more clearly defined as a *frum* (religious) school … I wouldn't approve but if he has to convert it into a *frum* school, I would much rather it was *Ohr Sameach* than *Lubavitch*, right. [But] the reality is that the constituency of the schools isn't *Ohr Sameach*. Maybe 10% or 15% of them are, but certainly not 100%. And 10% of them are straight Reform.[75]

One stakeholder sensed that the reason for the trajectory of the perceived changes at KD was the CEO's concern of being criticised by the religious *charedi* community. The CEO's attachment to the *charedi* community disturbed those members who believed that religious education should not be based on coercion or indoctrination. These members questioned whether educational practices that are legitimate in an outreach organisation, wherein people are voluntary affiliates, are considered educationally ethical in a school where the pupils are a captive audience:

> [The CEO] is a religious man and he's therefore going to think that he knows everything what Jewish education is about, and I was worried about what his opinion would be. I know the first meeting I sat with him, he said to me: 'I don't have a problem with indoctrination'. You know, and things like that worried me.[76]

The evidence shows that the CEO viewed the Jewish Studies teachers as allies in achieving the ideological goals, and thus deepened the gap between the Jewish Studies teachers and the rest of the staff who became the "others":

> I think that was a concern that everybody had, that he was going to make it more *charedi*. In the beginning especially… he's talking a little bit less like that, but in the beginning especially, he would do that. He would sit down with all the Jewish Studies teachers and he would say 'what happens in these meetings, needs to remain confidential, because *there are others out there* who don't understand the x, y or z'. Now that thinking made me feel like a form of fifth column of religious reactionary trying to make the school into what he wants it to be.[77] (My emphasis.)

Meetings with the Jewish Studies teachers were a safe place where the CEO could openly express his fundamentalist views. While some supported him wholeheartedly, others did not:

> For example – his idea that he made absolutely clear to us – he called a meeting of all the Jewish Studies teachers and personnel, and he said that he sees the time when there won't be a Purim play.[78] Where young girls – where *Tzniut* (modesty) will reign in the schools. Where boys and girls will be separated. Where girls won't be singing to male audiences. Oh yes, he's told us.[79]

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[75] Community leader, 28 October 2002. [Document 30:10 (515:529). Codes: CEO - making the schools more religious].

[76] Manager, 15 October 2002. [Document 39:24 (660:669). Codes: Restructuring - concerns].

[77] Manager, 15 October 2002. [Document 39:28 (707:725). Codes: CEO - making the schools more religious; Process – divide and rule].

[78] A tradition at the high schools whereby the pupils stage a play adapting the biblical Purim story to current affairs.

[79] Teacher, 12 July 2002. [Document 24:51 (940:948). Codes: CEO - making the schools more religious].

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The next quotation is quite telling whereby the teacher argued that the CEO was only making teachers more aware of the Jewish side of the schools without making it more religious. Yet the example that she provided about girls not singing in front of a male audience is essentially a *charedi* practice. This is indicative of how the *charedi* worldview became the "common sense" to some stakeholders:

> So he has tried to make it more into a Jewish Day School, though he is not making it a religious school. But he is making it more aware of its Jewish side … But he is making the teachers at least to know that it is a Jewish day school and to be aware of that. For example, he is not too keen on having girls stand up on stage and sing on their own … because of "Voice of a woman" problems or … he was very rigid about not having extra-murals on Fridays because of *Shabbat* … .[80]

Interestingly, the second example that the teacher highlighted – stopping extra-mural activities on Fridays – was always a tradition at the schools, yet she attributed it to the new reform. This could be explained as the greater visibility that was given to Jewish traditions at the school, or to the fact that the CEO was "re-inventing" and claiming some of the old traditions.

In spite of the above perceptions, and in spite of the repeated affirmations that the schools were becoming more Jewish, there were at least an equal number of stakeholders who did not perceive any radical change in the religious ethos of the schools, but rather a continuation of a process that had started long before the appointment of the CEO.[81] One manager maintained that it was the former director and the Department of Informal Education that had slowly effected these changes:

> And you know, the strengthening of Jewish values and the greater influence that religiosity has in the school, that's one thing I will say in defence of [the director] – it came very slowly – almost imperceptibly, but it was there. And before we knew it, it was playing a much bigger role and it didn't affect anybody. From that point of view it was very good. And the situation remains as it is. The Informal Department had a big role to play ... But that hasn't changed with [the CEO] there.[82]

This perception was supported by a community leader who maintained that it was the presence of other religious schools in Johannesburg that shaped the character of the KD schools:

> But it is a fact that the King David's, for example, because there is a Yeshiva College and a Torah Academy, they tend to look "right", … So I get the impression that the

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[80] Teacher, 26 May 2002. [Document 8:14 (277:314). Codes: Impact - religious base - more impetus].

[81] Twelve respondents (five were teachers) maintained that there was more religiosity at the schools while 11 respondents (eight were teachers) perceived that there was no change. An additional nine respondents (four were teachers) argued that the change was already there.

[82] Teacher, 12 July 2002. [Document 24:38 (784:797). Codes: Impact - religious base].

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> King David's, whether they like it or not, have become each year – they edge a little bit towards a higher standard of Orthodoxy … Many of the teachers don't even realise it, but it's there, maybe even subliminal.[83]

One parent likewise perceived the ideological change as a slow process that had begun long ago and echoed the transformation of the community. It is instructive how "naturally" the turn to the "right" in the community had been accepted by her in spite of the rather Zionist/secular ethos that she herself had been exposed to at KD. This is indicative of the hegemony of the Orthodox discourse and its position as the "common sense":

> But it's not something that's just happened since [the CEO] has been there, because I think it's come about slowly … it was happening before he came. So it's not something that he's introduced … it's different to when I was at King David … we didn't have a subject like Jewish Studies. It was incorporated in your Hebrew … . Then one must also consider that the entire Jewish community in South Africa is becoming more religious, just naturally ... .[84]

It was, interestingly, a gentile teacher who pointed out the dichotomy that the Orthodox hegemonic had created at the schools and the resulting crisis of identity for the organisation:

> I think there's a dichotomy. There seems to be a swing from many of them to become more religious today. And you've got the swing the opposite side with others that are more towards the Reform. … But I've noticed it getting – not necessarily the whole system becoming more religious, but I think again – I must be more careful … I think if you've got certain rabbis who want certain things and they make more pressures, or you've got certain people on the staff who want certain things, then sometimes I think very illogical changes are made.[85]

The perceived lack of a "real" change in the religious base of the schools was explained by the fact that the parents had not been *'educated yet'*. At AGM and PTA meetings, the new principal of KDLJ challenged the parents' morals. An Ultra Orthodox teacher voice did not experience any difficulties in shifting children's level of belief but maintained that success could only be achieved if the parents would follow suit. In this quotation she described the tactics used by outreach fundamentalist organisations to bring people in, and recommended it for the reinvention of the whole school community:

> You know children … learn very quickly. But I actually said to [the CEO] … and he agreed, I said, I think you have to get the parents on board. If you want to make real changes. And there are many parents who really do, who would be very interested in

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[83] Community leader, 28 January 2003. [Document 60:21 (718:746). Codes: Impact - religious base - has already been changed].

[84] Parent, 15 November 2002. [Document 44:25 (848:856). Codes: Impact - religious base].

[85] Teacher, 16 July 2002. [Document 38:31 (887:942). Codes: Impact - religious base - dichotomy].

> making real changes. But they need to be educated, you know. And you can run courses on philosophy and you can run all sorts of different – just to get people thinking. … It depends on how you pitch it. I mean I just think like [Ultra Orthodox outreach institution], they are a very successful worldwide organisation. We've been on a couple of the seminars … It's a beautiful setting. They do it in a way, you know, they don't impose – but it's so interesting, and they have an 80% success rate … [*CH: What is success?*] … like keeping *Shabbat* and increasing their levels of observance. So it depends on how you pitch it. And I think they certainly could do that here.[86]

It was also argued that one couldn't change the ethos of the schools while the profile of the teachers remained the same. The manager voice quoted below expresses the view that a quick fix was not possible for what Oakes et al (1998) describe as a "third order change" – a change which seeks to reform core normative beliefs of stakeholders about race, class and intelligence; to which I would add religion:

> Look, from [the CEO's] point of view, he would like to see the school obviously being more religious, and he's pushing that way wherever he can. And it's one of the things … because he would like to see things happening much quicker, whereas on a realistic basis, the teachers we've got are the same. Some of the teachers are more religious – some are not. So if your teacher base is the same, then things can't change as quickly as you would like them to change.[87]

Sarason maintains that *'we do not become aware of the social change until it hits us in the face, long after the seeds of change have sprouted'* (1998;29). Based on that, I would like to make two observations. First, the restructuring had alerted the community to changes that were already there. Once they became more visible they could begin to dominate even more the common sense of the community and thus encourage more religious behaviour. At the same time, the antagonistic feelings towards the fundamentalist undertone of the restructuring and the visibility of the changes brought some resistance to the process, even from those who would have been more accepting of greater religiosity under different circumstances. Thus, the fragile consensus based on incremental changes with the schools' relative autonomy had been replaced by conflict and contention, and by the assertion of greater centralised control. This created polarisation and dichotomies, and the exclusion of those who did not adhere to the ideological change.

Second, in spite of the perception that the schools had not changed much, the rhetoric of greater religiosity attracted more observant pupils to the schools. This could eventually change the culture and the ethos of the schools and act as a self-

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[86] Teacher, 27 March 2003. [Document 70:19 (573:605). Codes: Impact - religious base - no change].
[87] Manager, 16 October 2002. [Document 21:27 (559:568). Codes: Restructuring - quick fix].

fulfilling prophecy. Moreover, the cost-cutting exercise of the restructuring shifted funds that were designated to upgrading the educational as well as the social needs of the schools, towards those structures that would eventually influence the religious base of the schools. One can glean these changes from the following citation:

> So I think that we have more observant children in the school and I think through our procuring of one or two very good teachers – rabbis in fact – we have two rabbis on the campus – there are more *shiurim* (religious lessons), there are more lunchtime *shiurim* going on, but the school as a whole has not become further "right".[88]

The teacher quoted below also maintained that the changes were subtle but that their accumulated effect signified a definite change in the religious ethos of the schools. She also referred to the retirement of the Linksfield High School principal, who represented a more liberal approach:

> It's the end of an era. There's not even a chance that you can look at the school and say it's the same. I think [the director] brought a certain tone into the schools, being a rabbi and being more religious. I think Jewish Studies improved under him … But I can see now that [the principal of the high school] has left and that [the CEO] is in charge – that all of a sudden you are feeling – they have done away with fashion shows – now there is a problem with the *Bat-Mitzvah* … and all of a sudden all of the things that have been fine for 50 years, are suddenly being thrown out, and all the time you hear people saying – but we are not a *yeshiva*. And now a change of uniform – wanting to have a more conservative uniform … they don't want the girls to sing on stage if they are over 12. You know – this never happened at King David.[89]

It appears that instead of continuing with the evolutionary but rather slow cultural change process towards greater religiosity, the CEO aimed at a radical change that would turn around not only the financial situation but also the ideological and educational base of the schools. This required visible changes, such as reducing and diluting the Hebrew Department and strengthening the Jewish Studies Department, changing the uniform and introducing new teachers into the schools who would feel comfortable with these kinds of changes. The narrative shows that the CEO was applying similar tactics in the schools to those practiced by outreach programmes, aimed at destabilising the identity and reconstructing a new, instant identity. Given enough time, the managerial control over the community schools could enable the CEO to lock in the pupils and their families and to expose them to extremist views, thereby shaping the Jewish identity of the community.

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[88] Manager, 17 March 2003. [Document 69:39 (989:1002). Codes: Impact - religious base - has already been changed].
[89] Other stakeholder, 23 May 2002. [Document 12:19 (330:351). Codes: Impact - religious base].

'What is the difference between God and the CEO? God does not think he is the CEO'[90]

It is instructive to note that all stakeholders, whatever their understanding of the restructuring may have been, felt no ownership of the process. It was perceived as an authoritative and autocratic top-down restructuring. It seems that the lay leaders gave the CEO the ultimate power to shape the Jewish community schools. One respondent succinctly summed it up: *'He is doing whatever he wants to do, as he sees fit, according to a tune in his own mind, and none of us know what the tune is'*.[91]

Stakeholders perceived the process of the restructuring as a coercive and intimidating one, which excluded any consultations or discussions. It was perceived that the CEO was accountable to no one. The following extracts from recorded consultations with the CEO are examples of the bullying and threatening manner in which the CEO planned to proceed with the restructuring:

> That's all I'm telling the principals. You have an option – do you want to fight me? I am a fighter. If you want to join me and do it together with me, that's the way we've got to do it. The goal is clear. I made it clear – what we are trying to achieve – cost savings, etc. And if they go, for example – one of the heads of department criticised me yesterday in class, saying that I am scrapping extra lessons. In the end that person will look like a big idiot. All he is going to do is make himself into an idiot, because in due course the parents will know the truth. The kids will know the truth, and the teacher will look like a lazy blighter.[92]

> What I am asking everybody to do, and I said it to the principals – be positive, you know the need, you know the necessity. There are two ways of doing it. The one is a scorched earth policy, where you burn the place. In the end, by the way, the grass comes out greener. And I'm not scared. I am saying it. I am not scared. I don't want it … .[93]

Except for brief presentations, the CEO hardly visited the schools and most of the directives were announced on Fridays before school closed or on the last day of term before the CEO left his office, leaving the school community to struggle alone with the decrees. An acting vice-principal was dismissed without following any proper procedure, and as the school was closing to celebrate the festival of Passover. Stakeholders' phone calls, letters and faxes went mostly unanswered. Instead of negotiating and explaining his actions to the stakeholders, the CEO resorted to

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[90] Journal entry, 22 March 2002. [Document 55:933 (7719:7721). Codes: CEO - ultimate power].
[91] Manager, 1 July 2002. [Document 36:37 (1626:1628). Codes: Restructuring - hidden agenda].
[92] Recorded consultation with the CEO, May 2001. [Document 20:144 (3874:3889). Codes: CEO - coercive].
[93] Recorded consultation with the CEO, May 2001. [Document 20:108 (3992:4019) Codes: CEO - dealing with resistance].

bullying strategies, including ridiculing the past, discouraging critics and direct threats. Sending threatening "military-type" letters was the chosen management style:

> … No expenditure will be incurred for capital or other items … All purchases must be approved by head office before they are incurred. The procedure for this will be communicated to you in due course. Failure to comply with this will result in the Board refusing to pay for such expenditure.[94]

> Any car that is parked either in the wrong place or in non-demarcated areas may be clamped and the driver subjected to a disciplinary hearing.[95]

> There was a letter that [the principal] didn't want to distribute. And [the CEO] phoned [the principal] up and he said: 'You will distribute that letter – if not, you will be here on a disciplinary hearing and your job is on the line'.[96]

Most stakeholders rejected this type of change process, but not all of them. A teacher voice argued that with the failure of democracy, strong autocratic management was needed. Her reference to "too much democracy" is indicative of Ultra Orthodoxy's attack on egalitarian norms and values, which are seen as one of the major causes for the decline in values. However, since she is aware that "Jews need to feel that they are being consulted", she recommended that it was necessary to give stakeholders the illusion of participation without really considering their views:

> You know that the one thing that [the CEO] has made quite clear, is that he is autocratic, but it needed that kind of leadership … Because we've had wonderful democracies in the past at the school, but it hasn't worked. And I'm not saying that there shouldn't be consultation. And I think he should do more of that. He should respect the opinions and the needs of the parents. … And I think with Jewish leadership, it's always very difficult because everyone wants to have a say. And they feel very affronted if they are not consulted – but as [the principal] says, what you've got to do, you've got to be clever and you've got to say 'I'm consulting you', but at the end do what you want to do anyway.[97]

It seems that the CEO was his own worst enemy who could not make an ally even among those who may have supported him:

> But what I am saying is, I said it earlier, two-thirds of what the man is doing I believe in. Does he know what type of an ally he has got in me? Does he know what type of an ally he has got in the teachers at the schools and the parents? Work with us, don't tell us, work with us and help us work with you and together we will create it.[98]

> All of a sudden I was teaching 41 lessons a week [from 32] ... And we were told if we don't fit in, take it or leave it. So everything was done with threats – and with threats of disciplinary action. And I think we felt as teachers if we would have been

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[94] Memorandum from [CEO] to principals, directors, heads of department, 3 May 2001.
[95] Letter to all members employed by the SABJE, 15 January 2002.
[96] Other stakeholder, 10 January 2002. [Document 7:64 (1371:1380). Codes: CEO - coercive].
[97] Teacher, 27 March 2003. [Document 70:23 (662:684). Codes: Restructuring - top-down].
[98] Manager 26 June 2002. [Document 28:32 (929:949). Codes: Restructuring - top-down].

approached and the situation explained – there's something called "Jewish guilt" – people fit in, and people go the extra mile.[99]

The manager voice quoted below expressed the view that change could not happen without buy-in from the stakeholders and without understanding the culture of the schools and the context of change:

> If they made me the CEO of Nedbank – I wouldn't go in and within the first week, change the whole of Nedbank. I would spend six months studying Nedbank – studying the culture of Nedbank – going and asking people questions. Sitting, listening, looking. And then you start … You can't build something that people don't want, because nobody's going to go there. And this is the issue.[100]

Interestingly, in the next passage the same manager articulates Foucault's (1991) ideas about governmentality and the art of leadership:

> I still think in today's world, if you look at new management styles all over the world, it's all about consultation. It's all about making people feel that they are part of the process, because as soon as you alienate people, especially people who are in middle management, you lose their loyalty. They don't feel any more – I mean – the art of being a good leader is making other people feel that they made the decisions.[101]

This implies that stakeholders could have been satisfied with the *impression* of consultation rather than with meaningful participation. The CEO maintained that in the first month he *'had no less than 40 extensive consultative meetings with the principals, teachers, employee forum, administrative staff and parents'*.[102] However, teachers and principals experienced it quite differently, as the following quotations demonstrate:

> We were not part of any decision, it just "hits" us, and even in the Hebrew [department] he did not enable us to express our opinions, in our field of expertise. It was always his opinion, and he lays down the rules; like when he decided that in Grade 1 we don't teach reading anymore. And it did not help what we said, that it is important, and there is no reason for that … .[103]

> To discuss? We don't discuss anything. Nothing is discussed. If it's a three-hour meeting, two hours and fifty-nine minutes – we are told. There's no discussion. There's no room for any kind of – not dissension, or disagreement, or negotiation, or taking it from whoever's got the experience within their particular field. The decisions have already been made and they are just presented to us as a *fait accompli*. And then of course everything turns around, because when it comes down, and we don't accept it, we don't do it. Or we dig in our heels. And then of course it turns itself around completely and he's got to keep on taking a step back. Instead of first

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[99] Teacher, 9 January 2003. [Document 53:9 (270:275). Codes: Process - managed badly and indecently].

[100] Manager, 27 August 2002. [Document 42:21 (563:590). Codes: CEO - approach to change].

[101] Manager, 27 August 2002. [Document 42:13 (332:345). Codes: CEO - does not know how to implement change].

[102] New CEO for SABJE. *Davidian Star*. July 2001.

[103] Teacher, 14 May 2002. [Document 3:228 (272:279). Codes: Restructuring - top-down].

> discussing it where it should be discussed – come to the right decision as a group of people who have to administer whatever it is that he wants, he makes the decision and then all hell breaks loose. And if he's got to put it on hold or he's got to back-track, or he's got to – whatever. And then he accuses you of mismanagement and inciting people. And there's nothing that you can even discuss with the staff any more – because the minute you go and discuss it, you've broken confidentiality. But what confidentiality when you are the last to know, and all of this has been already discussed at various levels with different people here, there and everywhere.[104]

When I challenged one of the managers that he seemed to be taking many decisions by himself without consulting the CEO, I was told that:

> In truth, no one can actually go ahead with a decision without it being rubber-stamped. So automatically a huge amount of power, creativity, etc., is taken away from the schools … No teacher will do anything without first having it rubber-stamped because they are so scared – they are scared to do something that won't be okayed.[105]

There was a perception that the CEO would only work with yes-men. The manager quoted above felt compromised and coerced, but conceded that he had *'to be a Yes person, unless [he] wants to actually leave'*.[106]

If the CEO was indeed consulting, he did not consult with those he should have been consulting with. For example, educational decisions were first explored with the administrative staff:

> You know it was quite funny, [the human resources manager] said to me that [the CEO] said to her, 'What do you think of a middle school [idea]?' She likes it, you know, and I thought, well why is he asking her first; surely he should ask educators? But I left it, I didn't say anything to her ... How do these people who are theoretically only secretaries or secretarial staff or admin staff have more say over how the whole institution is going to run than the people at grass roots? And that is the scary thing.[107]

> I think he just doesn't communicate with anyone outside of certain chosen people because the Board is marginalised as well. I am on the Board and most of the decisions never really came to the Board either.[108]

The only public context at which some negotiations took place was the Employee Forum, where the ill-informed representatives had to bargain with the CEO who had the constant assistance of a highly paid labour lawyer as his main negotiator. The representatives were helpless, as one member of the Employee Forum explained:

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[104] Manager, 2 July 2002. [Document 6:105 (335:366). Codes: Restructuring - top-down].

[105] Manager, 16 October 2002. [Document 21:35 (683:703). Codes: CEO - ultimate power; CEO vs. principals].

[106] Manager, 16 October 2002. [Document 21:65 (1102:1133). Codes: CEO - works with yes men].

[107] Teacher, 17 July 2002. [Document 35:62 (1632:1639). Codes: Promotion; Restructuring - consultation].

[108] Honorary officer, 16 July 2002. [Document 26:10 (215:219). Codes: Lay leaders - CEO relationship].

> None of us fight [the termination of perks] because we haven't got the money and we haven't got [the knowledge] and we haven't got – in truth there are a lot of teachers there who are so desperate for their jobs, they are breadwinners, they cannot afford to be without this and so they just accept anything that is dumped on them. And he keeps threatening us, 'You want your long leave, that's fine, I'll declare the school insolvent and close the doors' … that is all I hear. All he says to us at the E Forum meetings is, 'then I'll close the school'.[109]

Certain respondents pointed out the difficulty of consultation in a complex organisation. One manager attributed this to the different interests and agendas of the stakeholders:

> I know he did talk about transparency, I know but maybe it is not possible in this situation. Because what I have found is that there is so much resistance that if you try to be transparent you get trampled. You know, you almost have to do things surreptitiously to get anything accomplished.[110]

Despite the perceived lack of consultation and the fact that the CEO hardly visited the schools, the stakeholders felt he was aware of every move they made. Classrooms or private meetings, even among parents, were no longer safe places where stakeholders could express their feelings without the knowledge of the CEO. The CEO admittedly was using informants to "spy" on the community:

> If a person says something to x, the chances of it not getting back to me are nil. For one reason, I'm networked … within the Jewish community, in terms of the work I've been doing, I've got a lot of contacts.[111]

The use of informants created an environment of deception, suspicion and distrust. It negatively affected relationships between the teachers and between the principals, as the following citations will demonstrate:

> We always talk about snitches in our departments you know, in our meetings. Everyone's always saying – now who's going to report to him? Who is the person that reported it? It never happened before.[112]

> There's no cooperation [among the principals] because the vibe around it, or the *modus operandi* around the new regime, is to divide and rule. So he plays one principal off against another. We are actually too scared to even talk to one another, because we don't know how he gets the information. He gets the information before we've even blinked an eye ... That's what scares me. But it's really very frightening. So we very seldom speak to one another now. We used to meet quite regularly.[113]

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[109] Teacher, 29April 2002. [Document 27:20 (574:586). Codes: Teachers - accept rationalisation].

[110] Manager, 28 May 2002. [Document 5:55 (792:818). Codes: Restructuring - no transparency].

[111] Recorded consultation with the CEO, May 2001. [Document 20:142 (3850:3874). Codes: CEO - uses informants].

[112] Other stakeholder, 12 July 2002. [Document 24:16 (440:452). Codes: Teachers - relationship with colleagues].

[113] Manager, 2 July 2002. [Document 6:51 (729:741). Codes: CEO - uses informants; Principals - cooperation during restructuring].

The lay leaders who supported the CEO denied that there was a lack of consultation and passed it off as a *'problem with communication'*.[114] The next quotation is quite telling, whereby a lay leader argued that there was a definite process of consultation, not realising that what had been described was a clear authoritative top-down process:

> We've just had a whole issue with the salaries. It was properly consulted and whatever. [We] were called to a meeting with the executive staff [of the high school], without [the CEO] being present. And we listened to all their gripes, and whatever and whatever. Wrote it all down and took it back to [the CEO], and thank God, I think we more or less sorted out the issue. But what was fascinating was, at the end of the conversation I said to [the principal], I said: 'I just want to ask you one thing. All this that you are telling me now, do you mean to tell me that in all this, [the CEO] never ever called you in and consulted with you, *and told you what was going to happen, and for you to pass on the information*?' And I knew I caught him out ... But he didn't have the guts to take it on to his staff. So that's what I'm saying – that you have a – in my opinion, in one sentence – you have a combination of a lack of leadership and you have, on the other side, an unacceptability of change.[115] (My emphasis.)

The above extract reveals other processes that were taking place. It shows that the power and control of the organisation was completely in the hands of the CEO. The lay leaders – who actually appointed him and were supposed to be the guardians of the Jewish community schools – were reduced to "write it all down and take it back to the CEO". It also demonstrates that the lay leaders were not taking responsibility for the failing process but rather blaming the "implementation dip" on people's inability to change and on the lack of leadership at school level. Criticism was silenced and strong threatening letters were sent from the Manco members to those who resisted the restructuring.[116] This indicates that bullying tactics permeated the schools and had become the norm.

Indeed, many stakeholders began to use the authority of the CEO to expand their own authority. Parents threatened teachers, teachers threatened pupils and managers bullied teachers. One manager maintained that even though she lost the strongest teachers in her department, she was much happier since it had become easier to control her staff. If teachers did not toe the line there was always the threat of a

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[114] Manco member, 7 March 2003. [Document 65:23 (815:822). Codes: Restructuring - no communication].

[115] Manco member, 20 August 2002. [Document 41:12 (346:375). Codes: CEO - instructions misinterpreted by messengers; Principals - role during restructuring].

[116] Private letters observed.

disciplinary hearing. Another manager was quite candid when she admitted, *'If I want anything done all I have to say is '[the CEO] says!'*.[117]

In response to the bullying, teachers resorted to gossip and complaining. The CEO often used the religious notion of slander – *lashon ha'ra* (literally, evil tongue) – in order to try and stop the rumours. In what has been described jokingly by one respondent as a *'Churchill stuff-up'*,[118] the CEO declared war on gossip and negativity:

> Let us guard our tongues and spread a message of positivism about our school. Whether it is in the car park, on the steps or on the beach we will never surrender to spread our feeling of enthusiasm. Let us remind each other of this undertaking, and if we have to complain let us remember that abuse achieves little.[119]

To sum up, the evidence shows that the CEO surrounded himself with like-minded people, or at least with people whom he could control. At the same time it also shows the limits of coercive, top down processes as stakeholders "dug in their heels" and the CEO had to retract his decisions. Lack of respect for dissenting voices is one of the reasons identified by Fullan (2001) for the implementation dip. In this change process the problem of implementation was blamed on the stakeholders' resistance to change and on "those few negative people" who incited others against the changes. An environment of fear, deception and suspicion was spreading. Coercion, threats and bullying tactics were used to gain control over the schools. This all resulted in fragmentation and in a low-trust community in which stakeholders were constantly looking over their shoulders.

'If you can prove that everything's rotten, then you can do whatever you want when it comes to change'[120]

As the school community was struggling with the emotions of fear and loss, there was much occupation with finding the reasons for the restructuring; in other words, with finding who was to be blamed for the crisis. While Chapter 3 identified numerous compound reasons for the Jewish community schools' predicament, the data indicates that in the perceptions of most respondents there were two main reasons for the crisis: the one was mismanagement, corruption and nepotism, mostly at Board level; and the

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[117] Manager, 25 June 2002. [Document 17:76 (935:943). Codes: Stakeholders - using the CEO authority to improve their own].
[118] Other stakeholder 23 May 2002. [Document 12:156 (1793:1799). Codes: Metaphors].
[119] Message from CEO. *Davidian Star*, April 2002.
[120] Manager, 16 October 2002. [Document 21:72 (1195:1218). Codes: CEO - throw away the past].

other reason was the deterioration in the quality of leadership, both lay and professional.

It was maintained that because of emigration, the community had lost many of its potential leaders. The people who were left to manage the community schools were not always the right ones for the job:

> Primary to this situation is probably that we did not have adequate leadership – people who were not able to control situations were placed in areas of high responsibility and … it was just assumed they would cope with the situation. And they share some of the blame perhaps, but I'm not sure it's a fair blame that they carry because it was too high an expectation. Part of this problem came about because of emigration. We were short of people to appoint. The search possibilities were not adequately done.[121]

Another interviewee agreed that the leadership had deteriorated but he perceived it to be a process that had developed over the years as the Board became dominated by parents rather than by community leaders. He argued that community schools need entrepreneurs with vision and not accountants:

> To establish something like a [Jewish community school] you need people who are not too concerned whether there is enough money to invest in education. Because according to all the realistic assessments, when they established KD there was nothing … They were no professionals like accountants, they were businessmen … If 50 years ago the people who established KD were the types of people who manage KD today, not only today, but also 10 years ago, KD would not have been established.[122]

The deterioration in the quality of lay leadership was also explained by the gradual professionalisation of the Board, which replaced the type of *'management system that depended on the full-time honorary chairman who gave his life and soul to it, and when he wasn't available, it tended to collapse'*.[123] The chairpersons over the past decades had become increasingly reliant on the professional officers. So when the crisis hit the schools, these lay leaders tended to blame the professional officers for the loss:

> We [lay leaders] weren't even aware of the extent of the crisis. To a large degree, unfortunately, it was masked by the structure that was in place. And to a large degree they [the professional members] – you know – steered their own ship with very little oversight from the lay leadership of the Board of Education. So when you've got complaints – person A is hardly ever at work – what were you actually supposed to do about it? … That was the function of the general director, and the general director

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[121] Community leader, 8 May 2002. [Document 10:11 (163:173). Codes: Reason - leadership not adequate].

[122] Community leader, 24 April 2002. [Document 15:14 (183:200). Codes: Reason - leadership not adequate; Lay leaders - selection of Board members].

[123] Community leader, 18 July 2002. [Document 23:17 (371:374). Codes: Reason - leadership not adequate].

was just as guilty as I think the rest of the staff in abusing their positions at the Board. The Board was held in very low esteem by the schools. That was my opinion. Rightly or wrongly – very difficult to say.[124]

It is safe to say that most stakeholders agreed with the perception that the financial crisis was caused by the mismanagement and corrupt handling of money by the professional officers of the Board:[125]

> I would say 70% of the problem at least, if not more, came from extravagance at the Board. I'm telling you, I am convinced of it. What did he [the director] need to drive – with all due respect – a R300 000 car for, to transport his family around? Look, wide knowledge I don't know…[126]

> Now [the administrative director] is one of the gentlemen who has been fingered as having his finger in the cash register. He's one of them … [The director] totally abused the system. You know, like his wife was employed at the Board, got a good salary, and was never there – kind of thing … .[127]

> I think there was terrible abuse of money, especially at Board level. Squandering. … I think that people got cars who shouldn't have got cars. There was an abuse of cell phones. There were too many trips to Israel. There were just too many people wandering around, not doing a proper job.[128]

> My children have gone through the nursery school, the primary school, the high school, with no facilities being improved over the many, many, many years, unless the PTA's improved them. And why? Because everybody was sitting on the Board. The Board got bigger than the entire teaching staff virtually. So many people had their hands in the till. This one was having alterations done at their houses – this is the gospel truth. I know. Their credit cards were used off the Board. Their cell phones were coming from the Board. Their cars were coming from the Board … It's a scandal that should have been exposed, and instead they … came to some agreement – that they let them go quietly and everybody kept quiet.[129]

The evidence shows that the CEO and selected honorary officers encouraged these perceptions, thereby creating the image of the CEO as the "hero", and the professional officers as the "anti heroes". The CEO publicly referred to the professional officers as the *'fat cats in the White House'*.[130] The "gravy train" became another popular metaphor.[131] However, no details were given; no charges were laid. When I asked the

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[124] Lay leader, 13 August 2002. [Document 45:18 (443:461). Codes: Reason - leadership not adequate].

[125] This seems to be the most prevalent perception among teachers, managers and parents. Lay leaders, community leaders and other stakeholders tended to speak about the deterioration of leadership without reference to corruption.

[126] Other stakeholder, 12 July 2002. [Document 24:47 (889:900). Codes: Reason - squandering].

[127] Parent, 14 August 2002. [Document 40:96 (1897:1903). Codes: Reason - squandering].

[128] Manager, 21 April 2002. [Document 4:21 (224:231). Codes: Reason - squandering].

[129] Parent, 30 July 2002. [Document 48:10 (149:219). Codes: Reason - squandering].

[130] Is Transformation in King David Possible – Is the Future Secure? 11 August 2002, Second Innings, Emmerentia.

[131] This image was repeated to me in many casual conversations and interviews.

Manco members about these insinuations I usually received vague answers such as: *'There were things that members of the professional management did, I would rather not go down that lane'*.[132]

During consultations with the CEO, the professional officers challenged him on these accusations and asked him whether they were going to be held accountable for the financial loss. His answer was vague but threatening:

> There are certain things that have occurred that I believe without question, could be challenged and attacked and brought to disciplinary hearings. I am telling you now. I'm not going to go into it. Some people know what some of these things are. But I can tell you now there have been some actions, and if anybody in the end wants me to, at some stage, I can proceed on that basis. I have chosen not to. But there are issues that certainly indicate that performance is most lacking … I said to the Board that I am not in favour of a forensic audit, and I'm not in favour of a witch-hunt … [133]

When I pressed respondents to reveal their sources of information regarding the alleged squandering and corruption at Board level, it became clear that some was based on assumed first-hand knowledge, some on unsubstantiated rumours, and some of it seemed to have been spread by certain members of the Board:

> Interviewee: The money was lost by certain individuals on the Board, so in fact the whole SABJE was responsible for the debt, not the teachers' salaries ...
> CH: *What are you referring to?*
> Interviewee: I'm saying they should have made those individuals accountable for the loss. If necessary, prosecuted them. The money was stolen from the Board.
> CH: *How do you know?*
> Interviewee: I was told by [the vice-chairperson] …
> CH: *And do you have any evidence?*
> Interviewee: I don't have any factual evidence, but I was told by her and it was hinted at by [the CEO] … .[134]

There were also those stakeholders who believed that blaming the professional officers of the Board for stealing was merely a scapegoat, and that there were other reasons for the financial loss:

> And there is also this kind of intimation that it was very corrupt before – that people were taking advantage. That there was mismanagement, that there was stealing … you know, all this kind of, 'Oh the Board has stolen a lot of money'. There was just that general kind of feeling, because I think a lot of people left very quickly. And there was talk of cell phones, and credit cards, and cars and travel allowances. Look,

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[132] Manco member, 5 August 2002. [Document 16:29 (495:502). Codes: Process - dismissing the previous Board].

[133] Recorded consultation with CEO, May 2001. [Document 20:147 (977:1044). Codes: Reason - squandering].

[134] Parent, 14 August 2002. [Document 40:51 (970:986). Codes: Reason - squandering].

> its nice to have 'whipping boys'. It's nice to say, 'oh it was the Board's fault'. My feeling was that they let too many kids be subsidised without really looking into.[135]

Certain stakeholders were uncomfortable with the rumours machinery. They felt that there was not enough clarity on these sensitive issues that affected people's lives and reputation, and that spreading blame and accusation is morally wrong. Moreover, it encouraged an environment of suspicion and hate:

> And there were also stories that [the director] is responsible for some of the problems. I don't know if it is true or not, they never really check the stories, and I said to them it is wrong, if you have something serious against [the director] you must verify it.[136]

> We were told by [the CEO] about all the misdemeanours that had been performed by the previous professional officers of the Board. And I felt that as a community organisation, we had some responsibility to inform our stakeholders, who are our constituents, about what had happened … [The Management Committee members] were so aggressive in running down and destroying people for all their wrongdoings, but they were equally aggressive in not allowing me to express a view that maybe we need to communicate it to our community. So I'm beginning to doubt whether it was actually true or not true … .[137]

The professional officers of the Board were dismissed with very little resistance from the various stakeholders. With the repeated accusations and blame there was a feeling among the school community that *'they deserved it'*.[138] One respondent was trying to explain this seemingly "uncaring" attitude as a survival mechanism:

> Because intrinsically each one of those principals only worried about his little domain, and they thought that *'if he [the CEO] will tackle the Board … he won't touch us'* and we will be able to continue to operate our schools as we have up to now. All of them think that they have a perfect school – which they don't. They all think that they run excellent schools – they run good schools, but there is still a lot to be desired. And so only until it started hitting them, then [the CEO] became the real [bad man] … let the Board go – poor [so and so]… but they didn't lose sleep over it. When it suited them afterwards, they could say to [the CEO] – 'but hang on – so and so used to deal with this, and so and so used to deal with that' … .[139] (My emphasis.)

The notion that "if the CEO will tackle them, he wouldn't touch us" was repeated throughout the restructuring in different forms. This preoccupation with personal or institutional survival questioned the whole sense of community and the discourse of care, and resulted in further fragmentation and loss of trust.

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[135] Other stakeholder, 23 May 2002. [Document 12:127 (1439:1451). Codes: Reason - squandering].
[136] Community leader, 24 April 2002. [Document 15:17 (242:248). Codes: Reason - squandering].
[137] Honorary officer, 15 August 2002. [Document 33:11 (364:388). Codes: Reason - squandering].
[138] Other stakeholder, 12 July 2002. [Document 24:47 (910). Codes: Reason - squandering].
[139] Other stakeholder, 15 July 2002. [Document 25:41 (940:962). Codes: Previous Board - dismissal].

After the professional officers were retrenched and out of the way, it was announced that the pupil:teacher ratio was the *'single biggest contributor to the losses'*[140] and the process of rationalisation of teachers' workloads began.

> It's just not acceptable ... Government schoolteachers have generally been doing 46 periods in a 50 [hour] week. I don't want to specify what some of our teachers are doing. It's ludicrous. I just came from one school where the staff room was full the whole time I was there, from beginning to end, with people sitting and chatting.[141]

Some teachers felt guilty. One teacher agreed that they were spoilt and really needed a *'shake-up'*.[142] Another teacher likewise agreed that teachers were very comfortable and that there was lack of control:

> Because people – it has been too long in coming … that is why everybody is screaming, it is very comfortable working in a place where nobody questions what you are doing and you get on with what you are doing and those who duck and dive, duck and dive … .[143]

The teacher quoted below disagreed. She maintained that teachers were made to take responsibility for the corruption and the mismanagement of the Board:

> There was a lot of mismanagement at the top. There really was. There was no question about it. But, who's borne the brunt, has been the teachers – and the teachers had nothing to do with it. And that has been our biggest gripe, is that we have borne the brunt.[144]

One teacher likewise maintained that instead of being made to feel a part of the restructuring, she was made to feel the *'cause of the problem'*.[145] This created a significant attitude change within the staff towards the new regime and towards the schools. Inside the staff room the secular teachers tended to blame the Hebrew teachers *'who were always seen to not have as many periods'* compared to the secular teachers.[146]

The teachers were further undermined when the CEO criticised them at public meetings and described them as lazy with not enough working hours – hence the financial debt – who are paid for extra lessons that parents, as customers, are entitled

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[140] New CEO for SABJE. *Davidian Star*, July 2001.

[141] Recorded consultation with the CEO, May 2001. [Document 20:57 (1691:1719). Codes: KD vs. government schools; Teachers - not working hard enough].

[142] Teacher, 24 October 2002. [Document 49:26 (911:919). Codes: Teachers - not working hard enough].

[143] Teacher, 17 July 2002. [Document 35:34 (885:899). Codes: Teachers - not working hard enough].

[144] Teacher, 9 January 2003. [Document 52:11 (350:355). Codes: Teachers - blamed for financial loss].

[145] Teacher, 27 May 2002. [Document 14:12 (331:343). Codes: Process of change - approaches to change].

[146] Teacher, 17 July 2002. [Document 35:71 (202:230). Codes: Reason - nepotism].

to get for free and that *'as the bell rings at the end of the day there is a danger that children will get trampled by the teachers rushing to leave'*.[147]

More insulting to the teachers was the enthusiastic clapping from the majority of parents as they cheered the CEO. One parent tried to rationalise the support that the CEO received from the parents:

> The parents inevitably see it when it doesn't work, they don't see what is working … Their experience is that teachers are very reluctant to go the extra mile ... They agreed with that perception, yes. I think it was wrong of him to play to that. But he was playing to a gallery. I mean, he knew he was playing to win the support of parents to do what he was doing, so he gave them what they wanted.[148]

The CEO eventually extended the blame to all the stakeholders. In the following extract, however, he sounded less like a rational manager analysing the reasons for the financial crisis, and more like a fundamentalist preacher calling the audience to repent:

> And I can tell you even the Board themselves last night, were digging deep into their souls to ask how [the crisis] happened and who is to blame, and bear the culpability, and some of the members expressed the feeling that they had culpability. And you ask: 'Is that strange?'. But I think it's a big step forward when everybody starts to say, 'we played a role' – by omission, by commission, by neglect, by whatever. I'm not talking about the Board, I'm talking throughout the system. If we would reach the stage where everybody admits – 'we have a degree of culpability' – I think we would be far on the way to solving it … When you admit that things are wrong, and you admit you played a role in it, then things start to improve. It's not punishment – it's part of the process. Many of the headmasters at this stage still believe they have no culpability at all. And the one issue of staff loads, which is directly their responsibility, even that they will blame on the people in this room [the professional officers] – to say they were not told to have these loads. And I say, oooo, you claim to be such a leading educationist who knows what's going on – you yourself have culpability. Many of the headmasters admit to me – 'we have known all along that the system is incorrect'. A parent last night said to me that his wife worked in the system. He said every year his wife came home with a bonus. It was comfortable. It was comfortable, but you see those who admit it was comfortable, are starting to admit a degree of culpability.[149]

It is evident that the destabilising effects caused by saturating the environment with feelings of blame and guilt allowed the CEO to apply his "scorched earth policy" to all areas of the organisation. He began with the professional officers, continued with the teachers and eventually attacked all the past achievements and ethos of the schools:

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[147] Parent, 16 July 2002. [Document 26:39 (820:868). Codes: Restructuring - creating distrust between teachers and parents].

[148] Parent, 16 July 2002. [Document 26:41 (842:854). Codes: CEO - playing one against the other].

[149] Recorded consultation with the CEO, May 2001. [Document 20:120 (4336:4369). Codes: Reason - no accountability].

> At a later stage – I don't want to mix it up with the restructuring – I can tell you now, I will challenge our success within our ethos. I will set criteria and we can measure them together, and I can tell you any thinking person who looks at our success, has to agree with me that we have failed.[150]

In the following quotation one respondent described one of the methods by which this was done:

> When I gave a report [to the Board] about the state of [the subject] in the schools … I was told by [the CEO] that you can't put any of those positive things in your report, 'I will have nothing of it – you can only report the negatives side'. So [ex-chairperson] was the one who said at the Board meeting, 'Well, why are you throwing out the baby with the bath water? Surely there was some positive'. And I wasn't allowed, to an extent, to say the positive at that Board meeting … If you can prove that everything's rotten, then you can do whatever you want when it comes to change.[151]

> I definitely think he's trying to change [the ethos] … Nothing that came before is anything that worked. Everything according to him is rotten, and he wants to redo it. Even if it comes to the same thing, he wants to redo it.[152]

Stakeholders became confused as the picture of the schools that the CEO was presenting did not match their own "imagined" community school. They were annoyed that an organisation – which had so many positives – was being viewed only from a negative perspective:

> I want my school to remain as it is. And it concerned me that he blamed the teachers. He called them lazy. He called the system iniquitous. He said that some of the headmasters had a closed door [policy]. He spoke very badly about [the principal]. He said [other principal] was unapproachable. You know things like that – I said to him, 'But hey, that is not my experience of these people. You are new'.[153]

There was also a strong perception that it was not only the schools that must remain the same but also the community:

> You see, we've become emotional and that because it's our community we are talking about – it goes way beyond the school. That's what upset me. It's not just the school we're talking about ... .[154]

At the same time as the CEO was belittling, blaming and putting the community to shame, he demanded respect for himself and was offended when it was not forthcoming. Respect for authority has been identified by De Ruyter (2001) as one characteristic of fundamentalist education, together with discipline and obedience. In

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[150] Recorded consultation with the CEO, May 2001. [Document 20:159 (2418:2435). Codes: Process - destabilizing the system].
[151] Manager, 16 October 2002. [Document 21:72 (1195:1218). Codes: CEO - throw away the past].
[152] Manager, 15 October 2002. [Document 39:51 (1026:1034). Codes: CEO - throw away the past].
[153] Parent, 14 August 2002. [Document 40:7 (162:170). Codes: CEO - view of KD].
[154] Other stakeholder, 4 November 2002. [Document 19:66 (1066:1070). Codes: KD - as a community school].

a most noteworthy citation the CEO expressed demand for respect, somehow blurring the difference between the respect demanded by a CEO of an organisation and the respect bestowed on a religious leader:

> Although it's a common problem within the King David School … that there's no sufficient respect … If, for example, I am invited to a function in my capacity as Chief Executive of the Board … then you have got to treat me in that fashion … I can tell you when the Chief Rabbi visits certain institutions that I'm involved with, he is treated with honour in the manner of his position … But if we have a chief executive, what is a chief executive of the schools? In truth, he's the headmaster's boss … And I'm not sure that the *'kovod'* (respect) was given to the position … .[155]

In the restructuring of the Jewish community schools the "manufactured uncertainty" discussed in this section began by discrediting the "old" professional officers. This was followed by challenging the academic achievements of the schools, the loyalty and integrity of the teachers and most significantly the ethos of the schools and its mission. At the same time that chaos was created – coupled with feelings of guilt and blame – and the "imagined" community school was put to shame, the CEO was presented as the solution that would bring order and save the schools.

It is obvious that what the restructuring did manage to do was to rip at the heart of the institution, as well as at the hearts of many people who worked there or perceived it as their home. In a most significant citation the teacher voice quoted below explained that in order to cope with the loss and with the emotions of guilt and blame, teachers blocked off their emotions and started to relate to their work as "just a job". In this new context fabrication and visibility had replaced commitment and authenticity:

> You see, in a way, one of the teachers said – it takes away that emotional guilt that we have – a feeling of belonging and over-extending ourselves. We don't have that same kind of commitment – you know – it's a job. And if we are told to do extra lessons [every day] from 1.45–2.15, that's it … Yes. But we are not touting for business. We are sending out a note in the newsletter saying there will be English on such and such a day and I'm certainly not encouraging children to come.[156]

The evidence shows that while the school community experienced the different stages of mourning for the loss of the "imagined" community schools – and by extension the loss of community, as they knew it – the CEO exploited and encouraged the associated feelings of guilt and blame. By directing the blame and guilt to all facets of

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[155] Recorded consultation with the CEO, May 2001. [Document 20:122 (4391:4430). Codes: Jewish values - respect].
[156] Teacher, 24 April 2002. [Document 2:5 (190:196). Codes: Teachers - compliance].

the organisation, uncertainties were manufactured and enhanced. Bullying and shaming stakeholders into compliance has been identified as a tactic used by new managerialism (Rees, 1995). This had adverse affects on the ethos and moral values of the schools. Stakeholders were turned against each other trying to find someone to blame. This created further fragmentation, division and pain.

It seems that the religious concept of repentance was used to shame the stakeholders into compliance; some of whom obliged by "confessing" to their "imagined" sins. One can identify another synergy between the managerial and the fundamentalist methods of recruiting adherers. As mentioned in Chapter 2, the emotions of uncertainty, shame and guilt benefit both business and fundamentalist groups, as both tend to build themselves on the ruins of human experience.

'I think that the lesson of how it was done, was not Jewish'[157]

One should not assume that the polarisation in the school community was based on the religious–secular conflict. There were those stakeholders who were clearly supportive of making the schools more religious as well as more efficient, but could not separate the means from the ends of such pursuit. I would go so far as to say that many religious stakeholders found it even harder than the secular respondents to reconcile with the restructuring and felt insulted to be grouped with the CEO because of their level of observance. They questioned the morality of the restructuring and perceived it as an antithesis to the Jewish ethos of the schools. This was expressed in phrases such as "it is not Jewish" or "Jews do not behave like that". One rabbi described the manner in which the CEO handled the school staff as nothing less than a desecration of God.

The criticism of a lack of morality was also directed towards the lay leaders who had brought the CEO into the system by deceitful means. It seemed that many stakeholders were not aware of that part of the process and accepted without questioning the restructuring at Board level, as already indicated in the previous section:

> I think that the actual process of the way the restructuring happened, it was very deceitful – it was very underhand. That no one knew what was going on. None of the executive members of the Board knew what was happening, and I think that the way they got [the CEO] into the system, I think was very deceitful … The [director] knew nothing about it until 20 minutes before he had to set up a meeting. Not even [the

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[157] Community leader, 8 May 2002. [Document 10:81 (221). Codes: Process - was not Jewish].

administrative director] or any of the other people who were involved, knew anything about it … And I think that in itself is a completely disrespectful, denigrating thing to happen … I think in an age where things like transparency and communication are becoming valued, I think that this was completely the opposite – the adoption of apartheid techniques. You know, people would want to speak about it, or speak up against him, and the next day they lost their jobs or they were threatened that they would lose their jobs if they continued in that way.[158]

Certain stakeholders, secular as well as religious, who turned to the Chief Rabbi as the highest moral authority to support them against the ruthless restructuring were disappointed when they realised that the Chief Rabbi *'has sold himself totally out to the [CEO]. You can't go and talk to the Chief Rabbi about these issues, because whatever you say will get repeated to the [CEO]'*.[159] Others believed the Chief Rabbi was *'blinded'* by the CEO and that he did not *'understand the depth of the agenda'*.[160] Stakeholders found it hard to reconcile this support:

You know, and I hope I'm wrong, you know when the Chief Rabbi stood up at Speech Night and said he admires [the CEO's] inimitable skills – and obviously it boosted his ego – because [the CEO] was sitting on the stage as well – I don't know who wants to imitate them.[161]

Thus while the CEO was preaching for respect, kindness and Jewish values, and for the establishment of *'new rules of morality – new rules of honesty – new rules of commitment'*,[162] those were hardly detected in his deeds. The gap between practice and rhetoric was so great that one manager, herself a member of *Ohr Sameach*, found it necessary to add at the end of the interview:

The only thing I can say, although in many ways he does not act according to the principles of strict Judaism, he is a very religious, very knowledgeable man. He is.[163]

In summary, this section demonstrates that the restructuring lost its moral purpose when the means could not justify the ends. Since the restructuring was identified with an increase in religiosity, the resistance to the restructuring manifested itself in resistance to religion. This resulted in less respect for the religion from a number of "non-observant Orthodox" respondents who maintained that the restructuring was

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[158] Manager, 15 October 2002. [Document 39:13 (543:571). Codes: Restructuring - deceitful; Process - intimidation and bullying].

[159] Manager, 16 October 2002. [Document 21:46 (803:817). Codes: Chief Rabbi].

[160] Community leader, 9 April 2003. [Document 74:2 (88:117). Codes: Chief Rabbi].

[161] Other stakeholder, 4 November 2002. [Document 19:16 (388:407). Codes: Chief Rabbi].

[162] Recorded consultation with the CEO, May 2001. [Document 20:147 (977:1044). Codes: Reason - squandering].

[163] Manager, 1 July 2002. [Document 36:38 (1632:1634). Codes: CEO - reputation].

pushing them away from Judaism.[164] Others maintained that since the restructuring they avoid going to synagogues.[165]

This section suggests that the secular-religious tension which has fragmented the Israeli society – that so far had not significantly affected the South African context with its unique phenomenon of the non-observant Orthodox Jew – had begun to manifest itself in the local Jewish community. This was in spite of the fact that many religious stakeholders resisted the restructuring as much as their secular counterparts. However, the ideological facet of the change and the crude authoritarianism in the name of religion had pushed people away.

'It's not just a restructuring – it's a coup d'etat'[166]

With the lack of clear understanding and with the loss of trust in the restructuring, stakeholders had their own perceptions of the trajectory and goal of the change. It was perceived that the lay leaders had abdicated their roles and had sold out the community schools. Respondents spoke about a takeover. Exactly who had taken over the schools was a topic of many discussions and speculations. During my interviews and casual conversations with stakeholders I heard many "conspiracy" theories about the CEO and his hidden agendas. In some stories he was motivated by profit, in others he was motivated by religious fanaticism. Others described him as power hungry and a megalomaniac motivated by the need to carve himself a name in the community:

> He keeps on saying it is financial, it is not, he is building himself an empire and he has got the backing of the rabbis … .[167]

Certain respondents felt that the CEO was there to destroy the schools, thereby forcing pupils to attend his privately owned colleges. This suspicion became prevalent when he curtailed most of the remedial services at the schools while opening a new private remedial school adjacent to his own college and in the vicinity of King David Linksfield.[168]

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[164] Manager, 14 May 2002. [Document 3:160 (1134:1149). Codes: Impact - on secular Jews].
[165] Journal entry. [Document 55:835 (1806:1811). Codes: Impact - on secular Jews].
[166] Manager, 12 July 2002. [Document 24:34 (736:747). Codes: Understanding - coup d'etat].
[167] Manager, 25 June 2002. [Document 11:141 (618:620). Codes: Restructuring - hidden agenda].
[168] See Chapter 7.

There was an opposite perception that the CEO had genuinely come to save the schools with no ulterior motive.[169] In the following quotation the respondent seemed to struggle to understand why others did not perceive the CEO in the same positive light that she seemed to view him:

> I don't know how most people feel about [the CEO]. I know that the Board is very impressed because of the finances, they have improved tremendously, but he and I have had quite a few discussions and I do feel that he has the interests of King David at heart. I mean there are people who … act as if they think he is undermining the system. I actually do not believe any of that. I think he honestly took this on because they were desperate financially, they were being threatened with closure, and I think he thought as a Jewish person, you know, they are asking him to do this, I think he really took it on in an altruistic way. I may be very wrong but that is the impression I get, that he is a realist and he sees that it is not working the way it is and he is trying his best to make it work one way or another ... He sees his job as fixing King David wherever he thinks it needs fixing … I see him in quite a positive light.[170]

When asked, the CEO claimed to be motivated by three factors: *'First – for the challenge, second – because the Chief Rabbi asked [him] to do it and thirdly – because [he] didn't know what [he was] getting into'*.[171] It is feasible that the CEO, as well as the unidentified *'top brains and talents in the Jewish community'*[172] were attracted to the managerial discourse of a powerful CEO who could single-handedly save the Jewish community schools by applying managerial solutions (that supposedly gave him a good return when managing schools for profit) to resolve complex economic, ideological, educational and social issues.

Significantly, the notion of the strong CEO creates synergy with the fundamentalist concept of charismatic leadership. This can explain why stakeholders perceived the CEO not as a ruthless manager but as a charismatic fundamentalist leader. His name *'has been on the tip of everybody's tongue for so many months, it's like the Z word – Osama Bin Zulberg'*.[173] As the process evolved and more incoherent, deceitful and even desperate measures were employed, the community basically demonised the CEO. He was compared *inter alia* to Hitler,[174] Eugene Terreblanche[175] and even to Haman.[176] The Board became known as the Taliban

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[169] As was mentioned in the methodology, Chapter 4, the newly promoted administrators as well as certain bankers and donors did not grant me interviews, and a presumably more supportive voice is therefore not reflected in my study.

[170] Manager, 28 May 2002. [Document 5:43 (647:666). Codes: CEO - wants to improve schools].

[171] Journal entry, 22 November 2001. [Document 55:934 (8720:8725). Codes: CEO - motivation for taking the job].

[172] Mammoth plan to save King David Schools has been put in place. *SA Jewish Report*, 1 June 2001.

[173] Teacher, 30 July 2002. [Document 48:24 (541:547). Codes: Metaphors].

[174] Lay leader, 29 July 2002. [Document 47:16 (523:527). Codes: Metaphors].

[175] Parent, 14 August 2002. [Document 40:21 (371:375). Codes: CEO - captivating stakeholders].

headquarters.[177] The strong support that the CEO received from the chairperson and the vice-chairperson gave the trio the label, 'the Troika'.[178] Not quite the respect that the CEO and the lay leaders might have expected, but it is indicative of the feelings of disempowerment and lack of control that the respondents had experienced.

On the other hand there was a perception that the CEO was the scapegoat rather than the villain who was given the dirty job that nobody else in the community was capable of doing.[179] I started to view him as the *Golem*[180] and wondered when the community leaders would restore him to dust.

In summary, this chapter shows the different levels of understanding of the restructuring. At the first level it was perceived as an economic restructuring that had to happen in order to reorganise the institution along more efficient business lines. The managerial solution, and especially the notion of a strong manager, was generally accepted as the only feasible way to restructure cash-strapped schools. Yet, the data reveals different understanding of what "school as a business" should be like. It also seems that the certainty of the business discourse gave some assurance to stakeholders who felt that no one else is going to help them. These expectations did not materialise and the implementation was perceived as being chaotic, impulsive and irrational. A gap between the official rhetoric and daily practice was observed. Eventually the restructuring was experienced as a ruthless top-down retrenchment process, imbued with religious extremists undertones. It was perceived that religious as well as economic needs took precedence over educational and community needs. This created fragmentation, division, suspicion and a general environment of deception. The CEO was perceived as a fundamentalist leader, rather than as a manager, who was using bullying tactics in order to control the school community. By saturating the environment with feelings of blame and guilt the CEO was able to shame the stakeholders into compliance and to undermine the "imagined" community schools. Once the past was invalidated and a culture of compliance prevailed, a new identity could be reconstructed. The evidence also reveals that with the almost obsessive

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[176] In the story of Purim, Haman was a minister in Persia (about 400 BCE) who wanted to exterminate all the Jews. In the Victory Park High School's adaptation of the Purim story, Haman was the CEO of Shushan (the capital of Persia) who refused to send the Jews of Victory Park to Israel. This was a parody on the exclusion of the school from a tour to Israel.

[177] Other stakeholder, 23 May 2002. [Document 12:158 (1818). Codes: Metaphors].

[178] Lay leader, 15 August 2002. [Document 33:16 (478:486). Lay leaders - Manco; Metaphors].

[179] Teacher, 8 January 2003. [Document 51:25 (696:707). Codes: CEO - henchman].

[180] According to legend, the Rabbi of Prague created a *Golem* to serve him, but was forced to restore him to dust when the *Golem* began to run amok and endanger people's lives (Encyclopaedia Judaica).

preoccupation with the CEO there was hardly any reference to the broader context within which the restructuring took place.

It seemed that the lay leaders chose a "saviour" and gave him ultimate power in order to save the schools from collapse. This resulted in a leadership without followers and in change without integrity, whereby promises were not fulfilled and negative emotions went uncontrolled. The common phrase was that the restructuring had turned from "crisis management" to the "management of crises", mostly manufactured by the impulsiveness, lack of a clear road map of the change and the perceived hidden agendas. By the end, the restructuring was perceived as no more than a process that changed those in power rather than one that affected any structures or culture of the schools. Ultimately, the process lost its moral purpose, an essential ingredient in Fullan's (2001) conception of leadership in times of change. Moral purpose is about *'both ends and means'* (ibid:13). One can argue that from the Orthodox perspective there was a moral purpose, that is, to encourage religiosity, but it seems that the emphasis was on a narrow interpretation of religion, and that bullying and other deceitful means were employed to achieve this end. Moreover, the hurried way in which the change was implemented targeted only visible and ritualistic elements within the religion rather than its moral values. Fullan maintains that leaders with a deep moral purpose are usually accompanied by a sense of urgency. Leaders in some such cases are in a hurry. Yet if they are in too much of a hurry, they will completely fail, as *'you cannot bulldoze change'* (ibid:9). Consequently, the restructuring lost all credibility and integrity, even among stakeholders who would have welcomed a turn to religiosity under different circumstances. As a result it created greater polarisation in the community between the religious and the secular Jews.

Vignette 1 below follows one policy from its inception to its conclusion; that is, the process by which the traditional *Bat-Mitzvah* service turned into a graduation ceremony. It describes an ideological change that was autocratically imposed on parents without consultation or open debate. It describes the way in which the tradition of the *Bat-Mitzvah* ceremony – which reflected the tensions within the "broadly national-traditional" character of the schools – was discarded, and how a new policy and new tradition was twisted and pushed to and fro until it reached its illogical conclusion. It also shows some of the deceitful means by which it was implemented. The vignette demonstrates the way financial and religious imperatives

had merged to create fragmentation and suspicion. Most of all it demonstrates that the CEO was not operating alone and that there were factions in the community, such as the Orthodox establishment and the financial elite, that supported his policies, even when these were resisted by most parents.

Vignette 1 - The graduation ceremony

Bat-Mitzvah (literally, daughter of the commandment) is a ceremony that takes place when a girl reaches her 12th or 13th birthday. The concept of a ceremony was introduced by the Reform movement in the 19th century. It later began to appear in some Orthodox circles, but never among the Ultra Orthodox. In the Orthodox tradition the *Bat-Mitzvah* ceremony is held for groups of 12-year-old girls whereby they recite some texts in the synagogue and are blessed by the rabbi. The ceremony has a more traditional than religious connotation. In the Reform temples the girl (at 13) may read from the *Torah* and address the congregation, similar to that of a boy's *Bar-Mitzvah* ceremony.

In the past, the Jewish community schools had organised this ceremony for the girls, which was the highlight of Grade 7 (the last year of primary school). The ceremony was preceded with a study programme that introduced the girls to Jewish laws and customs, especially those relating to the keeping of a Jewish home. It also included a community service aspect. The programme was run by the Hebrew departments of each primary school, even though in some schools secular teachers helped to organise the ceremony. The ceremony was followed by private celebrations ranging from a modest tea at the girls' houses, to fancy dinner-dance affairs. The inclusion of the Reform girls in this ceremony had always posed a problem for the schools, as the rabbinical establishment was reluctant to allow these girls to participate in the affair. This resulted in some painful consequences and was another example of the ongoing conflict at the schools between democracy and religion, as well as between Reform and Orthodoxy, as discussed in Chapter 3.

> Last year we had a head girl. And she's good enough to be head girl but was not good enough to be allowed to take part in the *Bat-Mitzvah*, because the mother is converted Reform. I've always been dead against it. I don't believe that you can have a child in our system and tell them that they are good enough to represent your school, they are good enough to be your head girl, they are good enough for everything that the school requires, but they are not good enough to take part [in the *Bat-Mitzvah* ceremony] and make them feel like an outsider.[181]

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[181] Teacher, 16 July 2002. [Document 38:32 (942:970). Codes: Bat-Mitzvah and Reform].

Over the years various attempts were made to resolve this conflict, but no permanent solution had been put into practice. It only affected a relatively small number of girls and was dealt with in a somewhat ad-hoc manner.

In February 2002, the CEO sent a circular to all parents announcing that the *Bat-Mitzvah* ceremony would be discontinued because:

> … they have given rise to complaints by, *inter alia*, the South African Union of Progressive Judaism (SAUPJ), in that it was alleged that there was prejudice against certain pupils. After extensive consultation with the Rabbinical Council of the Union of Orthodox Synagogues and also with the SAUPJ, the following proposal was accepted:
> - From 2003, the *Bat-Mitzvah* ceremony will be organised by the individual [synagogues], in consultation with ourselves.
> - We [the schools] will continue to offer a *Bat-Mitzvah* programme.
> - Several congregations have indicated that they are willing to accommodate pupils from outside their congregation, if necessary.[182]

The CEO later admitted that the reason was not so much the pain caused for the Reform girls but a concession to pressure coming from three sources. One pressure came from a Reform donor who was reluctant to donate money to a school that showed prejudice against his congregation. The second pressure came from the Chief Rabbi and *Beth Din* (the Jewish court) who objected to the inclusion of the Reform girls in the ceremony, and the third pressure was from the United Orthodox Synagogues that wanted to control the *Bat-Mitzvah* ceremonies.[183] Neither the parents, the schools nor the Board were consulted. This unilateral decision was accepted with the usual confusion, distrust and doubts, as the following quotations will demonstrate:

> I don't know what is happening now. They said it was the Reform, that that was one of the reasons but I am not sure that this was the reason. We never had major, major issues with the Reform over it, maybe one or two cases, that is why we used to send letters beforehand saying the child needed to be *hallachicly* Jewish. I don't think that the reason can only be the Reform issue. The Reform is a very small percentage of the community.[184]

> Personally I think he [the CEO] changed it because the Reform children were not allowed to go to the *shul*. The Reform parents objected to it. … To show no discrimination between the Reform and the Orthodox … .[185]

> So I think that the Board wanted to abandon it from a financial point of view, not from an educational point of view, certainly not from a Jewish point of view.[186]

> And then I hear now that the *Beth Din* also objected to these non *hallachic* girls being in *shul*. But the Ark is never opened. The *torahs* are never taken out. And instead of encouraging these children to be part of that – because there's always the odd chance that they will decide to re-convert again through Orthodox – and they will have gained another opportunity to get them in, but they pushed them aside.[187]

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[182] To all parents King David Primary Schools, 4 February 2002.
[183] CEO address to parents, 28 and 29 August 2002.
[184] Other stakeholder, 15 July 2002. [Document 25:20 (432:440). Codes: Bat-Mitzvah and Reform].
[185] Manager, 21 April 2002. [Document 4:84 (817:825). Codes: Bat-Mitzvah and Reform].
[186] Community leader, 8 May 2002. [Document 10:19 (245:265). Codes: Bat-Mitzvah and Reform].
[187] Manager, 2 July 2002. [Document 6:37 (554:586). Codes: Bat-Mitzvah and Reform].

The following stakeholder maintained that the *Bat-Mitzvah* ceremony was stopped to satisfy the Orthodox establishment, which had formed a strange alliance with the Reform for this purpose:

> Well you see – what's happening … basically there is a particular company in Johannesburg, without which various communal institutions cannot manage. … Because now they've got a crisis, you see. And if they want to keep the major [Reform] donor, then they have to make a few nods in his direction – but he doesn't want to rock the boat all that much, so he's not going to say, 'Well, you know, unless I see three Reform Jews teaching Jewish Studies by next week, I'm pulling my money out'. You know, so it's a bit of a stand-off – so they make the odd concession, but it's very sort of backwards and forwards, because the whole trend in the Orthodox Rabbinic establishment is to become more extreme and fundamentalist all the time. So he's pulling in the one way and they are pulling in the other way, and it gets a bit confused.[188]

> I think the orthodox *shuls* were saying that they wanted to have these orthodox *Bat-Mitzvahs* in their *shuls* because they felt that this was a way of locking families and children into congregations, which they do for the boys but they have never had the opportunity to do that for the girls, and they actually wanted that.[189]

There was another perception that the ceremony was cancelled because it was not recognised in the Ultra Orthodox community. Justice for the Reform Jews was therefore perceived as a pretext to introduce a *charedi* worldview:

> I also think that it is because [the CEO] is very religious, and according to the *Hallacha*, girls should not be seen singing. At Yeshivah [College] the *Bat-Mitzvah* is not even done and he does not see the importance or value of the ceremony … The Reform [gave him] the reason and the opportunity.[190]

One respondent clearly supported this decision. She maintained that if the Reform girls would participate in this ceremony, they "might get the wrong impression that they are Jewish". This indicated that there were some Orthodox-affiliated stakeholders who clearly supported the notion that Reform Jews are not Jews:

> I know why he changed the *Bat-Mitzvah* ceremonies and I agree with him … He actually showed a letter to the PTA, a letter that had come from the Federation of Synagogues … [they] quoted an incident whereby a girl whose mother had converted Reform and who had then come to King David, lived as a Jew, had a *Bat-Mitzvah*, got a certificate, had grown up, fallen in love and gone to a rabbi and said 'We want to get married' and the rabbi said, 'I can't marry you, your mother converted Reform, in the eyes of the Jewish religion you are not a Jew'. 'What do you mean', she says, 'Here is the certificate from King David proving I am a Jew. I had a *Bat-Mitzvah*'. And the rabbi said, 'Your certificate was thrown in our faces, you must stop giving certificates to these people, they believe they are Jewish'.[191]

The parents were unhappy with the decision to stop the *Bat-Mitzvah* ceremony. A petition was sent to the Board to complain about ending the tradition:

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[188] Parent, 8 November 2002. [Document 32:13 (497:526). Codes: Bat-Mitzvah and Reform].
[189] Honorary officer, 16 July 2002. [Document 26:43 (880:930). Codes: Bat-Mitzvah - stakeholders view of Bat-Mitzvah].
[190] Manager, 14 May 2002. [Document 3:231 (194:206). Codes: Bat-Mitzvah - reason for changing - strict Orthodoxy].
[191] Manager, 1 July 2002. [Document 36:35 (1460:1528). Codes: Bat-Mitzvah - Teachers' views].

> The reason we send our children to King David School is to have the "Jewish experience" that generations of women like me have had since the sixties and seventies.[192]

Moreover, the parents would now carry the costs of the ceremony, which had in the past been carried by the schools. This was another example whereby privatisation of community services shifted the costs from the schools to the parents:

> It's not a major issue. You see for the parents it became an issue, because the school – they paid their R550 or whatever the admin fees were, then to have it at a *shul* – you are talking about R3000 – R4000 they've got to pay – it's not part of the school day – they've got to go to extra *Bat-Mitzvah* lessons and breakfast *minyan* and it becomes another *schlep* for the parents.[193]

An attempt was made to solve the conflict and to have the ceremony held in the school hall:

> We are in the process of solving it. We have negotiated with [the vice-chairperson] and negotiated with [the head of Jewish Studies] to do a "Coming of Age" ceremony in the primary school hall ... it won't be called a *Bat-Mitzvah* ceremony, but all parents really want is their children, the girls in Grade 7, to stand up together, to wear pretty dresses and to do some choral verse.[194]

Yet the stakeholder quoted below did not think that parents should have any voice in this matter and that they should rather concentrate on raising funds for the schools. This was a reference to the ongoing debate on the position and power of the parents in the community schools, a topic that will be discussed in Chapter 6. She also expressed the *charedi* perspective that the *Bat-Mitzvah* is not a religious ceremony and that girls should not be allowed on the *bima* (pulpit). Yet, she still did not support the manner in which it was implemented.

> What is happening is the Grade 6s are all studying a syllabus in common. They will all write an exam and they will all attend a ceremony at a secular venue ... but not the girls standing in the *shul* by the *bima* thinking that they are now having a religious ceremony. That must end, I absolutely agree with it. But he [the CEO] just suddenly sends out a letter 'there will be no more *Bat-Mitzvahs*' and everybody's oh, oh, and they were hysterical and every change that comes about the parents – I mean, I attended some meetings where they said they are going to demand that he change this and change that and if he doesn't they are going to refuse to pay their school fees – and he very determinedly called in the PTA Executive and told them: 'You have no power, all you are is a fundraising body, stop thinking you have power'.[195]

Teachers' reactions were diverse. Some were satisfied as it was a demanding ceremony to organise and the preparation was taking up too much teaching time. Others thought that a special bond between the girls would be lost. It is also feasible that with the greater workload for the teachers owing to the restructuring, they had even less time and energy to prepare for the function, which is more in the realm of the community rather than the school. In the following

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[192] Dear Parents, petition sent to parents from a parent of a Grade 6 child, 4 February 2002.
[193] Teacher, 24 October 2002. [Document 49:12 (462:535). Codes: Bat-Mitzvah - teachers' views].
[194] Parent, 14 August 2002. [Document 40:39 (756:765). Codes: Bat-Mitzvah - stakeholders' view of Bat-Mitzvah].
[195] Manager, 1 July 2002. [Document 36:35 (1460:1528). Codes: Bat-Mitzvah - teachers' views].

quotations one teacher's voice uses the managerial notion of "inefficient" use of time, while the other teacher's voice clings to the discourse of the community, of unity and special bonds:

> I was very happy about it – because it's just a show. We lost three months in teaching time. It was always done during school … Just hours and hours of practicing. It's something I could have done in four weeks. The Hebrew teacher or whoever did it, did it in four or five months. I mean it's such an inefficient use of time.[196]

> Okay, well these children have waited to get to their seventh grade year and have this beautiful, wonderful ceremony that makes them feel so special. It unifies the group.[197]

The next respondent indirectly pointed to the fragmentation of the community, which would now permeate the school community as well:

> But again, the children aren't having it together now. They are all having it in little pockets at this *shul* and that *shul*, which is nice for the *shuls*, but it doesn't keep the school as a cohesive group. And I think that as far as the Hebrew staff at the school are concerned, I think that has alleviated a lot of their workload.[198]

One stakeholder was concerned that with the termination of the *Bat-Mitzvah* programme within the schools, a faction of the community, specifically the more secular members, would eventually abandon this tradition:

> I've tried to go back and influence situations at the Board. I know there was an intention to give up the *Bat-Mitzvah* programme in the schools. In fact it was a *fait accompli* – and they told me that it hasn't been done ... But I said to them – I can't tell you whether it's a right programme or a wrong programme, except that I believe that it's a right programme, otherwise you are going to make it an optional programme – and people who see it as an option might just decide to abandon it.[199]

By March 2002, to pacify the parents, the CEO sent another letter notifying them that there would be a new programme for Grade 6 boys and girls. The programme would take place during Jewish Studies periods and some afternoons. It was announced that the programme would be known as the King David "Girls of Valour" (*Bnot Chayil*) programme and the boys' programme would be called "Sons of the Torah" (*Bnei Torah*). Both labels have strict Orthodox connotations. It seems, however, that this was another school tradition that was claimed by the CEO as his own, and no real change took place:

> So we are working on what [the CEO] calls a special programme, but in actual fact it is my Jewish Studies syllabus in Grade 6 … and everything that I did he now says is his idea and that is the syllabus … but anybody who knows what went on in the school before!! But I just decided to let it be. The *Bat-Mitzvah* programme is virtually the same in the learning, it's just that there won't be a ceremony, which I am very happy about. So that is one good thing.[200]

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[196] Manager, 21 April 200. [Document 4:82 (792:799). Codes: Bat-Mitzvah - teachers' views].
[197] Manager, 2 July 2002. [Document 6:36 (533:549). Codes: Bat-Mitzvah to graduation ceremony].
[198] Teacher, 8 January 2003. [Document 51:33 (963:981). Codes: Bat-Mitzvah - teachers' views].
[199] Community leader, 8 May 2002. [Document 10:67 (234:245). Codes: Bat-Mitzvah - view of the ceremony].
[200] Manager, 26 May 2002. [Document 11:7 (132:142). Codes: Bat-Mitzvah programme].

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The reason that the programme would be conducted in Grade 6 and not in the traditional Grade 7 was explained by the fact *'that the average age of pupils has shifted in recent years, and there is also less pressure on the Grade 6 pupils'.* It was announced that the boys' and the girls' programmes would each culminate with a special gala evening to be held during October 2002. Dates for the separate functions for the girls and boys were given.[201] The CEO also announced the intention to have two *Shabbatonim* (weekends) – one for the boys and one for the girls, and their parents and siblings – at a resort during October.[202] At the same time parents were encouraged to contact their synagogues in order to organise the more traditional *Bat-Mitzvah* ceremony that had now become the function of the rabbinical establishment *'where it should be*[203] and not the schools.

Three month later, after the idea of the middle school suddenly emerged, another letter was sent to parents:

> With King David following the worldwide trend towards a middle school, Grade 6 will mark the end of the senior primary school phase. We have therefore decided to combine a graduation ceremony together with the *Bnot Chayil* and *Bnei Torah* programmes.[204]

This appeared to be the first time that parents and school staff became aware that there were plans for a middle school. It was announced that the gala function (now mixed for both girls and boys) would take place at the Sandton Convention Centre on 22 October and would include a seated dinner. Tickets were offered at R175 per person and each family was limited to five guests. It seemed that the CEO envisaged a huge banquet where he would be addressing a crowd of over 2000 parents and pupils.

Most parents did not respond and decided to boycott the affair. The CEO changed the venue to a smaller hall and reduced the price. Still, parents did not concede. Even the attempt to sell tickets by advertising that there were only a few tickets left did not impress the parents. It was then announced that the programme was open to all pupils in Grade 6 free of charge. Still, very few people agreed to attend the ceremony. Parents at Linksfied and Sandton continued to reject what they called the "extravaganza" envisaged by the CEO. They felt that it was an extremely expensive affair. The parents requested *'that a ceremony resembling the old accepted ceremony should be planned to take place in the school hall, and that no student of the school should be excluded for any reason'.*[205] The CEO refused to allow parents to distribute the minutes of the PTA meeting at which, among others, the *Bat-Mitzvah* issue was discussed. But a group of parents handed out copies of the minutes to parents at the school gates and at the "big walk".

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[201] Message from the CEO. *Davidian Star*, April 2002.
[202] New programme for Grade 6 boys and girls. SABJE. 15 March 2002.
[203] Head of Hebrew address to parents, AGM KDVPPS, February 2003.
[204] A letter from the CEO to all Grade 6 parents. Graduation ceremony – 22 October 2002, Sandton Convention Centre, 19 June 2002.
[205] Minutes of meeting of the KD Junior and Primary schools, Linksfield PTA, 5 August 2002.

Victory Park parents were in agreement, but not that involved, as they were more concerned about saving their school from closure:

> I expect there are more important things in life than fighting about that kind of issue. I'd rather King David Victory Park was still in existence in twenty years time, than fighting and using up our energy about Reform girls and *Bat-Mitzvah* classes.[206]

Subsequently, after gentle persuasion was not enough, the CEO made it obligatory for all children to attend the graduation ceremony. It appears that another supportive bank rescued the policy and decided to sponsor the affair for three years. The bank also opened a savings account for each child with an initial R108 as a gift. The gift would be given to the children at the graduation ceremony. Apple (1998) might argue that the children were used by the corporation to advance its own interests. However, my respondents by and large accepted this gesture as a good business investment on the bank's behalf with an educational value; that is, to teach children about money.

> I think the school managed – or the Board managed – to get a donation from [bank]. It's very clever – it's good marketing, that [bank] would open them an account and put in R108 as a present. So now my child has an account at [bank]. So now, if you want to keep the account, you will go and put more money in. So you are banking with [bank]. … I think it's clever. If the bank's prepared to do that, it didn't bother me, no.[207]

At the same time, the parents were promised that the synagogues adjacent to the schools would conduct the *Bat-Mitzvah* ceremony with the help of the teachers who used to organise the school ceremony. Parents were required to pay teachers directly. Teachers were satisfied as this meant they could earn extra money. Moreover, during this time, the weekend-long *bosberaad* that took place with a human resources facilitator (sponsored by another private bank), had resulted in the creation of good will by the school management towards the CEO, and the teachers therefore cooperated and encouraged pupils to attend the graduation ceremony.

One of the participants in the graduation ceremony, who was trying to make sense of the new tradition and of the CEO's new approach of appeasement towards the school community, said:

> We still don't understand what this ceremony is all about: At the beginning we understood that it was a ceremony to replace the *Bat-Mitzvah*. It was supposed to be called Women of Valour and be only for the girls. After that the boys were added and it was called *B'not Chail* and *B'nei Torah*. It then changed its name to graduation because in the meantime the idea of the middle school came up and it was thought that it would be a good idea to end primary school with a ceremony. But the middle school did not happen, so it became *B'not Chail* and *B'nei Torah* again. A rabbi from Cape Town that gave the speech referred to it as *Bar-* and *Bat-Mitzvah*. Children's projects were everywhere. The tables were laid for a meal. Many children were there, teachers, principals, heads of departments, the coordinator for Jewish Studies and the public relations officer. From KDS out of 54 children, seven parents arrived. There are parents that are still angry that the *Bat-Mitzvah* ceremony was cancelled, and that their children were forced to go to the graduation ceremony … Everyone [school staff] got expensive presents. The children received certificates and presents … A thank you card written by [the CEO] to each of

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[206] Parent, 21 October 2002. [Document 43:57 (1296:1396). Codes: Bat-Mitzvah - stakeholders' view of Bat-Mitzvah].

[207] Teacher, 9 January 2003. [Document 53:31 (742:757). Codes: Bat-Mitzvah - bank support].

> the teachers … Some children thought it was boring, some children thought it was nice. It could have been nicer – not emphasising food but education. It was too religious for us – there was a separation between men and women – which is not really a King David way.[208]

The children were also confused. They were not sure what they were graduating from, or why 11- and 12-year-old boys were celebrating their *Bar-Mitzvah* programme that should take place when they turn 13:

> And the graduation ceremony this year in Grade 6, to me, was a fiasco. It wasn't thought out well enough, and wasn't implemented well enough, and what are they graduating from? I think [the CEO] thought he was going to have a middle school when he introduced the word "graduation". But because there isn't a middle school, what did they graduate from? From nothing … *Bar-Mitzvah* year is only this year. Our children didn't do that much extra. They'd learnt their Jewish Studies – so they did some *Bikur Cholim* (visiting the sick) to the hospitals and, and then he had a whole dinner. So I don't know. The children weren't quite sure what it was all about, because they wanted to know what they were graduating from … .[209]

At the beginning of January 2003 a letter was sent to the parents from the public relations officer of the Board to inform them of the date for that year's graduation ceremony, whose function was *'to acknowledge all Grade 6s on the completion of the Bnei Torah and Bnot Chayil programmes and for their outstanding efforts through their community service'.* The cost was down to R150 per visitor, while children would be sponsored by the bank. Each school had by then obtained a video camera to record events that would take place during the year to use as footage on a promotional video to be aired at the graduation ceremony. This "glossification" of the schools' activities meant that much focus would be directed towards recording and performing, rather than learning or doing community service.

The parents were told that in the previous year *'many parents had requested to attend at the last minute and unfortunately could not be accommodated. They regretfully lost out on the opportunity of sharing this exciting event, seeing their child graduate from the Jewish Studies programme'.*[210] This time most parents booked their seats in advance and a new tradition had taken root. At the same time teachers continued to prepare the girls for their *Bat-Mitzvah* ceremonies at the different synagogues. Parents paid extra for the service. Rehearsals were occasionally held during school hours. The Reform girls were excluded.

The ending of the *Bat-Mitzvah* programme is an example of a primarily ideological change that was imposed on the school community, transforming one of its central

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[208] Journal entry, 26 October 2002. [Document 55:793 (2307:2364). Codes: Bat-Mitzvah to graduation ceremony].

[209] Teacher, 9 January 2003. [Document 53:30 (697:741). Codes: Bat-Mitzvah to graduation ceremony].

[210] Letter to all parents of Grade 6 learners, 16 January 2003.

traditions. The pretext was correcting the past injustice done to the Reform girls, but in reality it served to satisfy the views of the more Orthodox segment of the community. Another change in this category was the cessation of the *Ulpan* programme to Israel. The pretext for the termination of that programme was its elitist character, and thus it was also justified as an act of social justice and equality that would correct the wrongs of the past. In reality it served to discard one of the hallmarks of the Zionist/secular/national ingredient of the schools (see Chapter 3).

In both changes, the ideological rationale interacted with the economic imperative of the restructuring. With the managerial demands for more efficiency and a reduction in the costs of teaching and teachers, the time that was dedicated to organising community functions – such as the *Bat-Mitzvah* ceremony – was considered as an inefficient usage of human capital. The same applied to the *Ulpan* programme, as clearly articulated by the CEO. In this case the notion of community was advanced to justify standardisation of services:

> The *Ulpan* doesn't cost us money. When I say it doesn't cost us money, it depends on how you look at it. It doesn't cost. It can cost, because we are putting a lot of effort into the labour. None of these costs are ever allocated. But what I am trying to say is that our questions go to the very core of our ethos. Are we a school for the community or are we a school for the rich?[211]

This implies that services that cannot be audited should be eliminated, especially if they happen not to coincide with the *charedi* worldview. This supports the claim put forward in Chapter 2, that a drive for efficiency encourages schools to concentrate on the measurable and devalues the other functions of the school, such as its social function in the community and creating bonds among pupils and teachers.

The introduction of a new uniform was another ideological change that was initiated by parents who wanted to modernise certain items in the uniforms. Parents' need for renewal – which was endlessly debated with the previous regime and never reached a conclusion – was another pretext to change completely the colours and the shape of the uniform and to introduce more conservative-looking outfits. At the same time there were economic benefits, as the Board took over control of both the manufacturing and selling of the new uniform. This was another example whereby

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[211] Recorded consultation with the CEO, May 2001. [Document 20:32 (646:670). Codes: Israel - *Ulpan* programme]

economic and religious imperatives joined together to eradicate the symbols of the institution, thereby preparing the ground for the construction of a new identity.

I do not claim to know the real motives behind the CEO's actions or anybody else's actions. Nevertheless, while personal financial profit cannot be excluded in understanding the motive for the changes, the manner in which the CEO attacked the social and educational fabric of the schools points to the interplay of the envisaged monetary profit with the *charedi* antagonism towards the secular/Zionist/national ethos of the schools. The CEO presented himself as both a prophet calling for "re-Jew-vination"[212] of the school community while at the same time he would incur financial profits – for the schools and for himself.

This chapter followed the interplay between fundamentalism and managerialism. Both claimed to be the forces that would correct past inequalities and establish an orderly society based on either religious fundamentalism or on the fundamentals of the market. The business concept of a henchman – who cleans out the rot and reorganises the institution – coincided with the fundamentalist view of eradicating the past life and reconstructing a new identity. The motif of a "new tree" and the notion of a "scorched earth policy", are common both to corporate restructuring and to the establishment of a new religion. The solution for both a failing business and for those Jews "who became slack in observance" was a complete change without continuity; the past was rotten, the future would bring the truth. Clarke and Newman (1997) who trace the intersection of the ideology of the New Right with managerialism, observe:

> Like all good discourse, the new managerialism announced the conditions of its own necessity – elaborating a tale of failings of the old management and their dire consequences. … The born-again manager could rescue the situation brought about by the failure of the old corporate mentality …

The most important question that was at the back of my mind throughout the fieldwork was why – in the face of badly managed change, resistance from parents and school staff and much pain and unhappiness (not from those who lost their jobs but rather from those who stayed on) – the restructuring received the support of many stakeholders, especially the lay leaders of the schools and the community leaders; and how could this ruthless and incoherent change process be exerted and sustained? One manager voice quoted below demonstrated a preoccupation with the same issue:

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[212] See Prologue.

> My understanding of [the restructuring] is that the Board was in this huge debt, and had to come out of the debt … and there were players behind the scenes – and donors were refusing to give money until everything was taken into … some sort of situation where it was looked after – and this person's name was put forward. Everyone bought into it – and whether they like it or not, now, whether they are being bullied now or not – they are seen to be just running behind that. I'm not sure why they are all so scared to change their minds even if they disagree with what's going on at the moment. … The people on the Board of Education are wealthy individuals – these are people who have their own businesses – they don't owe anything to anybody – they are doing it on their own free time – yet, they are all scared. [213]

This topic is discussed in Chapter 7 where it is suggested that the restructuring was accomplished not only by enforced change but also by winning the consent of many stakeholders. Moreover, it would be suggested that the historical characteristics of the community as well as a complex alliance of forces supported the process for different reasons.

Prior to that, in Chapter 6, I will follow the two main discourses of the restructuring – the economic and the ideological – and will explore further how they interacted in the complex terrain of the Jewish day schools wherein numerous tensions have pulled and twisted policies into different directions and knots. These conflicts will be viewed through the lens of new managerialism and its advocacy of efficiency, decentralisation, goal setting and different relationships between stakeholders.

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[213] Manager, 16 October 2002. [Document 21:43 (756:770). Codes: Reason - financial].

Chapter 6
From King David to McDavid

The narrative so far reveals that the restructuring of the Jewish community schools evolved through the interplay between market and ideological forces. The market drive aimed at replacing the bureau-professional structure with a managerial regime that emphasised cost cutting and efficiency. The ideological drive aimed at intensifying the religious base of the schools and shifting them further towards the "right". My thesis is that the discourse of new managerialism was used in order to gather support for the restructuring, while masking a ruthless top-down process of "economism" which aimed at generating both financial and religious benefits – that is, "profits and prophecy".

The aim of this chapter is to interrogate the rhetoric of the managerial restructuring, to reveal the inherent contradictions within the discourse of new managerialism, and to demonstrate the synergy that it created with religious extremism.

Towards this end, I review the changes imposed by the restructuring through the lens of new managerialism. I specifically explore how the notions of efficiency, decentralisation, goal setting and accountability were interpreted, implemented and experienced at the Jewish community schools. I demonstrate the synergy as well as the contradiction between the managerial, religious and community values.

The evidence reveals a wide gap between the intended goals and their implementation, with intended and unintended consequences. I show that the managerial restructuring intended to produce what I term McDavid; that is, the *kosher* equivalent of the McDonald's school described in Chapter 2. The McDavid School is envisaged to offer to customers (parents) an explicit, predictable, standard product, delivered by a disciplined and efficient workforce that would work "more for less" and is controlled by systems of accountability, such as appraisal and performance-related pay. The chapter identifies those policies that were implemented to varied degrees, and those policies that were rejected by the culture of the schools and the agency of the stakeholders. The attempt to impose a new mind-set quickly caused division, suspicion and lack of trust. As a result the managerial restructuring affected negatively the community values of the schools and produced demoralisation,

demotivation and fragmentation. At the same time it distracted the school community from focusing on the quality of their educational provisions.

I end this chapter with a second vignette that follows the trajectory of one policy that had the pretext of educational improvement and the intention of changing the school structure to comply with global and national trends. And yet this was the policy that brought down the CEO and caused his eventual dismissal, as mentioned in the Prologue.

The drive for efficiency

One of the initial steps in the restructuring process (April 2001) was to change the accounting system to comply with Generally Accepted Accounting Practice (GAAP), which included leave pay and depreciation. It was calculated that an amount of R7–8 million was owed to the school staff for accumulated long leave. After including all these extra liabilities the debt at the end of 2001 was R37,400,323.[1] Stakeholders spoke about a round figure of R40 million.

Two years later, at the 27th Conference of the South African Board of Jewish Education, the Board showed an *'audited surplus (after expenditures and including donations) in the 2002 financial year of nearly R12 million …. The debts (that is liabilities) decreased from the end of 2000 level of nearly R38 million to under R18 million at the end of 2002'.*[2]

Stakeholders perceived this to be a miraculous turnaround that had saved Jewish education and had *'changed the school [from one] that was losing millions and millions into a school that is … making millions, and that at least has meant that the school can continue forward'.*[3]

It is not clear how much was saved due to donations, due to the introduction of GAAP, or due to the introduction of sustainable systems that were successfully used in the private for-profit colleges. As the previous chapter clearly demonstrated, the process was not transparent and information was not always available to stakeholders. The objective of this section, therefore, is to point to some apparent means that were used to achieve efficiency and how those were understood and experienced by the

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[1] South African Board of Jewish Education, Annual financial statement for the year ended 31 December 2001. Auditors - Grant Thornton Kessel Feinstein.
[2] Notice to all principals, teachers, staff and parents, 10 April 2003.
[3] Community leader, 18 July 2002. [Document 23:24 (428:437). Codes: CEO - financial success].

stakeholders. It is not my aim to present a financial report, however, quantitative data will be included where available.

The budget cuts were aimed at reducing the cost of central administration, the cost of teachers, the cost of teaching and the cost of community services, such as remedial education, social and psychological services as well as outreach programmes. Many implementation problems emerged. It is therefore argued in this chapter that the managerial reform was a short-term solution that gave the community temporary financial relief, yet was unable to provide a sustainable solution to the inherent complexities in the management of a Jewish community school. At the same time it impacted negatively on the ethos of the schools and on the loyalty and motivation of the stakeholders. I will also demonstrate that the budget cuts were not neutral and were often used for political or ideological gains.

The analysis of the data reveals a distinctive difference between stakeholders outside the schools and those inside the schools in their understanding of the financial recovery. While the former glorified the financial gain irrespective of how it was achieved, the latter lamented the decline in professional values, educational standards, community services and human worth.

Reducing the cost of head office

The dismissal of the professional officers of the Board was meant to reduce the cost of managing the organisation. The figures in Table 1 indeed show a significant saving on salaries at Board level, despite the fact that the figure for the first six months of 2002 may still include some retrenchment packages. However, since the CEO's remuneration package was not revealed this could not be a conclusive statement. It is also probable that some of the savings on the overhead expenses were achieved by reducing the cost of professional development (see following section) and by shifting expenses to the schools. For example, it appears that the schools paid R2,853,373 in administration expenses to the Board for the first six months at 2002.[4] There is, however, very little data and it is mostly sketchy.

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[4] Expenditure for the period Jan–Jun 2000 (H/O, Casper and transport expenses allocated to schools).

Table 1 – Board Expenditure[5]

	2000	**2001** (Including retrenchment packages)	**2002** (**Jan–Jun**)
Salaries	5,342,690	6,793,511	2,091,440
Overhead expenses	3,794,191	2,052,943	761,933

As the restructuring evolved, the Board's building filled up with different functionaries, mostly in administrative roles. The following respondent applauded the tactic of replacing long-term employees with new, cheaper ones without considering the immorality of this act (Bottery, 2000):

> [The CEO] was very, very clever. There were people at the Board … who were earning very big money because they had been there for a very long time. He managed to get them off, he got rid of those who were costing a lot of money and not really doing a terribly good job. Yes, at the end of the day, for example in the finance section, he got rid of too many people; you can't run that finance section with so few people. What he has brought in is new people whom he is paying very low salaries because they have still got to build themselves up.[6]

Stakeholders also noted that most of the new employees were gentiles. It is unclear whether the main motivation for this was to increase racial equity, to have administrators who are not emotionally involved with the community, or to have an efficient and disciplined workforce that would keep the Board of Jewish Education open for business most days of the year, including Jewish holidays. Moreover, the new positions were not advertised but were handed out to people who were brought in by the CEO. It therefore seems that the restructuring at Board level had a strong political objective in order:

> … to get rid of anybody who had power to make any decisions. If you look at the building where the Board is, there were five or six people who could make decisions in different areas. Now there's one person and secretarial staff. And that's it. There are a couple of other people, but they are just there to do the bidding of what [the CEO] wants, and that's a very big change.[7]

The unavailability of data made it difficult to assess the financial gains following the dismissal of the professional officers. The political gain was, however, clearly identified. Through this process the Board lost much of its "memory", continuity and accumulated experience. The identity of the new organisation would therefore be based on forgetting rather than on remembering:

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[5] SABJE, Income and expenditure report, January–June 2002.
[6] Manager, 1 July 2002. [Document 36:13 (738:749). Codes: Cost cutting - less expensive staff].
[7] Manager, 15 October 2002. [Document 39:10 (517:541). Codes: Previous Board - dismissal].

He is also a person who wants his own people, his yes-men, so he cleared the Jewish Board of all the people who had the experience and knowledge. He did not build on what they knew but brought in new people. And the worst is that they were speaking about the need to cut and cut, but somehow the offices in the Board have filled up. Today there are many new people.[8]

Reducing the cost of teachers

The cost of teaching was reduced by cutting the number of teachers, their remunerations and perks. The following sections will elaborate on these measures and will explore the stakeholders' reaction at the imposed financial cuts.

Retrenchment

It was evident that *'the only way you can save money in an organisation where 80% of your expenses is on salaries is to cut down on the number of bodies around, which is a very painful exercise'*.[9] Exact numbers were not available but it seemed that each school lost 10–30% of their teaching staff. The figures in Table 2 show the reduction in the salaries bill. Caution is needed when reading these figures as the 2002 figures might include retrenchment packages and at the same time they do not include the July increases. However, even keeping the salary bill from escalating in two years is a considerable achievement in an inflationary economy.

Table 2 – School Expenditure[10]

	2000	**2001** (Including retrenchment packages)	**2002** **(Jan–Jun)**
Salaries	46,225,304	47,509,887	22,454,983
Overhead expenses	8,673,881	11,951,572	6,359,281

The overwhelming perception was that the retrenchments were necessary and that the schools were over-staffed. It is also inevitable that in a harsh restructuring process *'you never ever get rid of the people you want to get rid of. You always get rid of the people you shouldn't get rid of'*.[11] The main concerns were therefore whether the right people were retrenched and whether the process was as humane as possible. The evidence shows that the answer to both these concerns was negative:

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[8] Manager, 14 May 2002. [Document 3:23 (239:246). Codes: CEO - works with yes-men].
[9] Lay leader, 13 August 2002. [Document 45:5 (180:185). Codes: Teachers - salaries].
[10] SABJE, Income and expenditure report, January–June 2002.
[11] Lay leader, 28 October 2002. [Document 30:44 (718:727). Codes: Process - retrenchment process].

> There were some that went voluntarily because there was so much uncertainty around what was going to happen … A lot of people went and looked for jobs out there, to go and see if there was anything else for them – and a couple secured jobs – okay. Some of them I didn't want to lose, but there were others that I was quite happy to see the last of ... .[12]

The initial plan was to select people on the basis of their skills. Teachers were therefore requested to reapply for their jobs, and a committee was supposed to select the most qualified teachers.[13] The process had to be handled by the principals without any directive or support from the Board. At one school, teachers sought union advice and refused to reapply for their jobs. Another school went along with the procedure. The degree of compliance depended on the approach of the principal and on the presence of teachers among the staff who were not afraid to voice their opinions or to act upon them. At one school, the obedient principal followed the process while telling selected teachers in private that their jobs were secure. At another school the principal joined the union together with the teachers, but had to withdraw the membership since the CEO refused to communicate with anyone who was a union member. By the end of the process it was perceived that "some good teachers were lost" to the system.

As secular and Hebrew teachers were retrenched, more Jewish Studies teachers, religious youth leaders and campus rabbis were employed.[14] Though rabbis were always involved at the schools, it was perceived that the intention was that they would have more authority in Jewish matters than the principals to ensure that the schools adhere more strictly to *hallacha*.[15]

Long leave cancelled

Long leave was cancelled with immediate affect and steps were taken to get rid of the debt related to accumulated long leave, which was estimated at R7–8 million. A new timetable was introduced (July–December 2001) with a possible load of 40–48 hours for each teacher (instead of the usual 30–38 hours). This necessitated subject teaching by the teachers who remained "active". Teachers who became "inactive" had to use

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[12] Manager, 2 July 2002. [Document 6:30 (455:469). Codes: Process - retrenchment process].
[13] Recorded consultation with the CEO, May 2001. [Document 20:106 (3933:3955). Codes: Process - retrenchment process].
[14] I unfortunately have no statistics and this information is based only on the interviews.
[15] *Hallacha* – the entire corpus of Jewish Law.

up their accumulated leave or do locum work for other teachers who were ill or on leave. In a matter of a few months part of the debt had been eliminated.

Thus until the end of 2001 *'there were people coming and going and a lot of backbiting'*.[16] Schoolwork was disrupted, the pupils were unsettled and parents realised that the restructuring would affect their own children:

> When he did the retrenchments, my one son had four Hebrew teachers … My other son, when his teacher went away, one of the little girls [in his class] phoned her and said: 'Please Mrs ... Can you come back?'… So she came back a week early. She couldn't take it any more.[17]

Teachers had a difficult time adjusting to the increased workload, especially when they were assigned to grades and subjects that they had never taught before and were given no time to prepare or adjust. My data reveals the use of different coping mechanisms as teachers adapted to the intensification of their work:

> We are now doing borders and colouring in. There is not the same pressure to achieve and enrich. The teachers are pacing their work slower so they can cope with the demands. Instead of resting during free periods they are taking it easy during class. Most of the teachers seem to comply with the demands and are afraid of losing their jobs. Everyone's trying to keep themselves as clean as possible and not get involved. As long as they can get through their day and have it as easy as possible and as trouble-free as possible.[18]

Other coping mechanisms included: *'teaching the lesson and pushing stencils'* at the children; giving less homework that would require marking; marking during lessons instead of after hours (as was done previously); and avoiding any community or enrichment activities.

The tense atmosphere created by the "long leave" phase was over when the year ended, however, the loss of trust and suspicion remained, as I will demonstrate later. Interestingly, part of the "miraculous" financial recovery happened when the long leave was added to the debt and was then saved by teachers' increased workloads. This left stakeholders wondering what percentage of this financial gain was paid to the CEO.

Increased workload

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[16] Manager, 17 July 2002. [Document 35:11 (296:358). Codes: Process - teachers to take long leave].
[17] Parent, 14 August 2002. [Document 40:63 (1197:1207). Codes: Process - teachers to take long leave].
[18] Journal entry, 25 September 2001. [Document 55:73 (9224:9231). Codes: Teachers - adapting to change].

On the whole, teachers' workloads were increased. Locums were no longer available, and teachers were instructed to take over the classes of their absent colleagues. Middle management was given the same workload as ordinary teachers. There was a requirement that primary teachers would teach 40 hours a week while high school teachers would teach 35 hours. This was not always adhered to and managers found some creative ways to make the timetable look heavier than it really was.

Teachers usually do not like to admit that they are not giving their best to their pupils. In a typical answer to the question, *'Has the restructuring impacted on the quality of your work?'*, the teachers would point out other teachers who had been affected, while maintaining that the quality of their work had remained almost the same in spite of the increased workload:

> You know what – on some people, yes. On me, I'm giving exactly what I've always given but I'm a lot more tired. You know what – from 31'ish to 40 at [Grade 7] level, your marking, your preparation, your energy – that it has impacted on … I'm not lazy. I'm not scared of hard work. But your time just to see a kid – to get yourself focused – you don't have that kind of time at school any more.[19]

> One is much more pressurised ... So in a sense to me, your teaching – one has to teach obviously at an excellent standard – but in a sense because of all the pressures, you find the teachers are actually getting sick. And teachers are pressurised, and you find that maybe they have less patience with the pupils than they had before – because your expectations are still the same.[20]

Stakeholders outside the schools perceived it differently. One honorary officer maintained that working a little harder would not harm the teachers and the fact that there were no resignations was a sign that the workload was manageable:

> I think also the fact that [the CEO] is asking teachers to work a little harder, can't harm anybody. They do have, or they did have, a pretty good life. You know what – as a result of all that, there haven't been any resignations – the fact that they are working harder. There have not been any resignations. So that didn't worry me particularly.[21]

Some teachers did in fact resign, but in the main teachers stayed at the schools despite constant mutterings about leaving. (I will come back to this topic later in the chapter.) Certain teachers did admit that they had had a rather easy life before and that the intensification of the workload was not unjustified. At the end of the first year of the restructuring there was a feeling among teachers that they had managed to *'pick up*

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[19] Teacher, 24 October 2002. [Document 49:18 (665:693). Codes: Teachers - workload].
[20] Teacher, 26 August 2002. [Document 31:18 (369:416). Codes: Teachers - workload].
[21] Honorary officer, 29 July 2002. [Document 47:6 (371:377). Codes: Teachers - workload].

the extra load and make it work'. But what seems to have begun eroding at that stage was their level of commitment. The common phrase was: "It became a job".

Teachers' salaries

More efficiency gains were achieved by reducing the salary bill. In the first year (2001) of the restructuring the teachers had to forfeit the annual government increase of nine percent. A "cost to company" salary scale was introduced whereby perks became part of the salary. All these changes were accepted with mixed feelings and without much open resistance.

It was announced that the system was top heavy and that there were too many vice-principals and deputies earning high salaries. With the declining enrolment figures this expense was perceived to be unsustainable. It seems that the CEO tried to eliminate a tradition that had been entrenched in the schools for many years (as described in Chapter 3) by applying a simple formula:

> The number of vice-principals will be according to a formula. I want to take away the whole arbitrary nature of a lot of this within the school structure here … I want to basically say, here is the structure for the schools … . If a school loses 50 kids … it may well give rise to the fact that there are too many vice-principals at the school, because again, my formula is a simple one – that you take the number of kids in the school and divide by 200, and that gives you the number of headmaster and vice-principal posts.[22]

There was, however, a wide gap between intentions and implementation. In order to alleviate the problem of highly paid executives the CEO decided to introduce salary parity and an equitable system that did not discriminate and differentiate between employees. The new salary scale was implemented in July 2002, when the government increased teachers' salaries by another nine percent. As a result some teachers who were previously overlooked, new, less qualified or those compensated by other means, such as accommodation, were delighted with their increased salaries; while the high salary earners were expected to forfeit a second nine percent general teachers' increase. The CEO presented this action as a way of correcting the inequalities of the past. The quotation below shows that those who resisted it were presented as immoral people who "abused children". This is an example of the democratic rhetoric of new managerialism and its pretence as a just system:

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[22] Recorded consultation with CEO, May 2001. [Document 20:70 (2091:2154). Codes: CEO vs. school executives].

> I was told that the KD teachers are underpaid. There is a band of teachers who were horrifically underpaid. There is a band of teachers who were right on spot and there is a band of teachers who are overpaid. I went to the teachers and told them that and I realised that there are some teachers who have been using their muscles for a long time to get much more money. Consequently – I am loved by some, neutral to others and hated by some… I brought new scales that took away all discrimination. Some people got 35% – they are very happy. I don't know why, they should have realised that they were cheated before for a long time. And the people that did not receive an increase – they did what is typical – they run to the class and abuse the children. Like the one teacher who said – I will not teach. The children then run to the parents who run to the Board.[23]

By that stage the restructuring had lost much of its credibility among stakeholders. There was much upheaval about the establishment of a middle school, the closure of the Victory Park campus, the cancellation of the *Bat-Mitzvah* ceremony and the introduction of new school uniforms. Teachers and parents were up in arms about the lack of transparency and the autocratic manner in which decisions were made. While many teachers were scared and subdued, the executives at Linksfield High School openly opposed the CEO and were communicating these feelings to the parents and pupils. There was a perception that the discourteous behaviour of the CEO towards teachers was created by design to create ill-feeling amongst the executives who would look for better positions, and in the end would not be replaced, or would be replaced with cheaper teachers.[24] However, this did not happen. When the executives threatened resignation, parents supported them and the CEO had to retract the policy of salary parity.

This raises the question of whether salary parity is at all beneficial to a system. One respondent argued that in the competitive private education market in South Africa one has to maintain quality and acknowledge those who are valuable to the system.[25] A lay leader was confused: while he seemed to support the notion of parity and equity he also realised that this might affect the achievements of the schools. This is also an example whereby stakeholders agreed with the CEO while their experience told them otherwise – a topic that I will return to in Chapter 7 when I analyse the impact of the CEO's charisma on the restructuring process:

> The problem with any system is that you have people who earn too much … and you have people who earn too little. … The vast majority are sort of on the right scale, and I think one's responsibility is to try and bring the excesses in line on both sides of

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[23] CEO's presentation: Is Transformation in King David Possible – Is the Future Secure? 11 August 2002, Second Innings, Emmerentia.

[24] Parent, 14 August 2002. [Document 40:32 (593:601). Codes: Teachers - salaries].

[25] Manager, 8 October 2002. [Document 34:11 (386:456). Codes: Teachers - salaries].

the scale. But having said that, at the end of the day, the King David system is – in my words – a centre of excellence – and I don't think anyone wants to tangle with that.[26]

Another lay leader quoted below seemed to buy into the idea of equity and parity, but was surprised when he encountered the "implementation dip":

> I heard one of the complaints was that … the useless teachers got huge increases. So … here you look at a situation and say – certain teachers are being underpaid. Surely as a respectable organisation, you have to look to those situations as well – to then be told that, well, you know – you are overpaying the useless teachers. You can't win![27]

In sum, the policy that aimed at introducing parity and an equitable salary scale was not implemented as envisaged. There were still reports of ongoing attempts to keep certain teachers from resigning by offering them better packages.[28] There was still no transparency and none of my respondents at school level were shown how the scale worked. The general feeling was that *'certain people will always negotiate separate deals for themselves, although [the CEO] said there won't be any of that, that there's perfect equity'*.[29]

This clumsy attempt to equalise salaries and to make the system less "top heavy" had negative effects on the system. It seemed that the CEO had opened a "Pandora's box".[30] Employees began to compare their salaries and wanted to know why some received so much and others not. The whole episode left teachers with a bitter taste and with a feeling of alienation from the organisation:

> So what's happened is that the Board to a certain extent today, has lost that human touch … people, in my opinion, are not seen as teachers with needs who have to have certain things and if you were given a little bit extra in your salary, fine. Today you are a cost to company or a cost to the Board, and your relative importance is your cost to the Board rather than you as a teacher and an academic who the Board is going to look after as best as possible, because they want to keep you within the system.[31]

More cost savings were achieved by reducing the fee assistance programme for teachers, by cancelling extra payments for working overtime or running clinics during school holidays, by employing new teachers on a yearly contract without any perks, etc. One can conclude that following the restructuring teachers were required to work

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[26] Manco member, 5 August 2002. [Document 16:19 (344:357). Codes: Teachers - salaries].

[27] Lay leader, 13 August 2002. [Document 45:28 (610:683). Codes: Teachers - salaries].

[28] Teacher, 8 January 2003. [Document 51:3 (267:292). Codes: Teachers - leaving the system; Teachers - salaries].

[29] Teacher, 30 July 2002. [Document 48:3 (77:86). Codes: Teachers - parity].

[30] Manager, 14 May 2002. [Document 3:27 (259:272). Codes: Restructuring - creating distrust between stakeholders].

[31] Teacher, 26 August 2002. [Document 31:13 (261:275). Codes: Teachers - dehumanised].

"more for less" and no attempt was made to ensure that the quality of education would be retained, and that teaching would not be disrupted. The evidence reveals that these policies negatively affected the morale and commitment of the teachers as well as their loyalty towards the organisation. This created further divisions and suspicion among staff. Moreover, as Chapter 5 clearly demonstrated, none of these policies were implemented in a coherent manner so as to reduce stress. Teachers waited until the last day of term to find out whether or not they would get increases. Rumours were spreading. The principals were not involved in any decisions, yet they had to implement them. It was all in the hands of the CEO and his financial/secretarial team who tried to fit people into matrixes, formulas and salary bands. This rationality was resisted. It seemed that the Jewish community schools still remained, in a term borrowed from Reimer and McGinn (1977), an irrational organisation.

Reducing the costs of teaching

Certain budget cuts targeted the educational provisions of the schools. Subject teaching replaced the less efficient class teaching in certain grades, while this was resisted in the lower grades. There was a reduced subject choice, which affected the high schools more than the primary schools, but some decisions were reversed when parents and teachers objected. Speech and Drama as a matric subject was taken out of the curriculum for one year only to be re-instituted the following year. Research maintains that a curriculum is never a neutral entity but rather determined by the ideology of those in power (Apple, 1979). It is therefore my claim that the cost cutting in educational provisions was in synergy with the ideological facet of the restructuring. The diluting of the liberal arts was just another attempt to pull the schools towards the extreme "right" and towards the "closure of the pupils' minds". The following examples will further substantiate this claim.

Standardised curriculum

The evidence indicates that the rhetoric of achievement and individuality that had characterised the KD schools had been replaced with demands for standardisation and uniformity. In this way schools could be controlled and monitored:

> So in many areas the schools need to have the same character when it comes to their ethos. When it comes to, for example, the carrying out of secular syllabi, I believe there has to be uniformity. In other words, that there shouldn't be a difference in standard between History at Linksfield and History at Victory Park, and even in the

coverage, it needs to be coordinated – that by the end of term, both schools would have done x – this would put pressure on some, but by the end of term two, the coverage would be the same, and the exams would reflect that coverage.[32]

The teachers were not perceived as the experts, but rather as technicians who delivered a curriculum that was written elsewhere:

> We should not be below standards but also not above standards. The books are very good, they were written by experts who had time to sit and write.[33]

The demand for a standardised curriculum was a combination of cost cutting, control and ideology. As a cost cutting exercise, teachers were requested to develop notes in a book form or to use prescribed textbooks in order to save on the cost of paper. The costs would be shifted to the parents.

A standardised curriculum implies a changing notion of teacher professionalism. Instead of teachers as the producers of a curriculum, teachers were portrayed as the deliverers of a curriculum. Their labour would thereby be controlled by common central exams. This would also cut overheads and teachers' time. Thus, while the schools were struggling to adjust to South Africa's revised Curriculum 2005 and to show that they were moving towards outcomes-based education (OBE), the teachers had the conflicting demand of producing *'an old fashioned scheme of work'* with weekly, monthly and term preparation.[34] The pressure for uniformity was especially strong in the Jewish Studies subject where the CEO demanded that there be a highly prescriptive curriculum, where each lesson would be planned in advance to the end of the year.

With the lack of investment in secular studies, and with the decentralisation of control of the general curriculum to the schools, the CEO advocated a shift from the Independent Examination Board (IEB) – to which many independent schools in South Africa are affiliated – to the public schools system. The pretext was social justice and the good of the country:

> Kader Asmal [Minister of Education] decided that there would be one national system. I am all for this. It is not so gloomy. I am not for the IEB – but for a national system. I believe that I have to consider the good of the country. … I don't see any difference between the IEB and GBE [Gauteng Board of Education]. The minister wants to limit the choice of subjects – no foreign language or Jewish Studies in the

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[32] Recorded consultation with the CEO, May 2001. [Document 20:23 (520:533). Codes: CEO - wants uniformity].
[33] Journal entry, [Document 55:686 (3982:3987). Codes: CEO - educational ideas].
[34] Manager, 2 July 2002. [Document 6:97 (1023:1038). Codes: CEO - educational ideas].

> school. If Kader Asmal will have his way he will not allow religious learning in the schools – and here the Jewish schools are alone in the fight.[35]

The quotation above demonstrates that a national curriculum posed opportunities for reduced costs as well as a threat to the Jewish identity of the schools. It seemed that the CEO was reluctant to join the Independent Schools' Association of Southern Africa (ISASA) in its negotiations to preserve an independent system.[36] As a matter of fact, there is evidence to suggest that he de-registered some of the schools from membership of the ISASA. By the envisaged shift from the independent to the public system, more costs would be cut.

The policies leading to a unified and standardised curriculum throughout the system, like many others, were not implemented, but in many cases teachers complied with some external demands, such as prescribing textbooks for their pupils. Subsequently, parents purchased books which were often only used symbolically to justify the expense, while teachers continued to work from their own worksheets. It seemed that the teachers only provided visible changes while continuing to work as they had always done.

Control over expenditure

By centralising purchases and dividing the schools into small cost centres, the CEO was able to institute strong control mechanisms over expenditure. Unfortunately, I do not have much information regarding these initiatives, especially from the perspective of the administrators. Teachers occasionally complained about the difficulty in getting hold of parents and how they needed to use their private cellphones in order to communicate with parents. They complained about the lengthy procedures they had to go through when needing telephone lines, paper, stationery, material for laboratory experiments, the bus service, etc. Library budgets were cut and school outings had to be paid by the schools' fundraising activities or had to be negotiated with the Board. In order to avoid having to bargain with the Board teachers and managers preferred to omit these outings, or chose outings that cost very little. At the same time, outings for the *Bat-Mitzvah* programme as well as the organisation of the ceremony were centralised at Board level and became the role of a newly employed public relations officer. This again shows the shifting of funds from educational to ideological needs.

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[35] Journal entry. [Document 55:662 (3776:3785). Codes: Curriculum 2005 - future of Hebrew/JS].
[36] New educational policy a challenge. *The Sunday Times*, 16 September 2001.

Less qualified teachers

Evidence shows that while experienced teachers and teachers over 60 years old were encouraged to leave, they were replaced with less qualified or new teachers. Art, Drama and Music teachers were replaced by class teachers with no special qualifications in these subjects. Following strong criticism from parents, new specialist Art and Drama teachers were employed, but again these teachers were mostly newly qualified or unqualified in the relevant subjects. While the saving on the liberal arts could be viewed as a neutral budget cut, one should not underestimate the ideological rejection of these subjects by the stricter religious sectors. There was also an attempt to employ teachers more for their level of religious observance than for their qualifications:

> [There is a new] untrained teacher who is an IJ, which I call an Instant Jew, *Ba'alei Teshuva*, with limited knowledge and is virtually training how to teach … the CEO feels that she is *frum* (religious) and she is learning … .[37]

Recruiting teachers for their level of observance rather than for their pedagogical skills was perceived to have pros and cons, especially in the field of Jewish Studies:

> We either have rabbis who are not qualified teachers. They know nothing about pedagogy or, which is just as bad, we have qualified teachers – they know pedagogics but they know nothing about *Limudei Kodesh* (Sacred Studies), they've never opened the Bible before.[38]

However, where teaching is aimed at increasing the level of observance, children need to learn by example:

> You can teach somebody to teach but you mustn't stand up in front of children and say, 'Do it, but I don't!' You have got to be able to speak from what 'I' do because children can only trust you if you are doing it yourself.[39]

Professional development curtailed

In the first two years of the restructuring the professional development of teachers was mostly neglected, with the exception of Jewish Studies. There was some professional development around the introduction of the OBE curriculum. Selected teachers took personal initiatives, but those were mostly self-financed. The only

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[37] Manager, 26 May 2002. [Document 11:1 (77:86). Codes: Jewish studies - teachers' qualification].

[38] Community leader, 28 January 2003. [Document 60:11 (209:224). Codes: Jewish studies - teachers' qualification].

[39] Manager, 1 July 2002. [Document 36:21 (979:986). Codes: Jewish studies - teachers' qualification].

visible change was the introduction of Kumon math[40] in certain classes in the junior school at Linksfield; a move that was financed by parents and was received with mixed feelings by staff. The introduction of Kumon math confirmed the role of teachers as deliverers of the curriculum and resulted in a further shift of expenses to parents.

Though the information regarding finances is not comprehensive, the figures in Table 3 reveal a startling contrast in educational input between the previous and current management:

Table 3 – Investment in professional development, 1999–June 2002

	1999[41]	2000[42]	2001[43]	2002[44] (Jan–Jun)
KDL	126 368	112 730		5 555
KDVP	82 814	88 410	9 643	9 725
KDS	35 339	39 892		600
Yiddish Folk	381	19 122		1 425
Board – educational development	177 501	354 239		
Board – professional development	666 927	383 999		
Total	**1 089 330** (1.5% of the total budget)	**998 392** (1.5% of the total budget)		**17 305** (0.04% of the total budget)

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The Jewish Studies Department, with new two coordinators to begin with, was the only department that organised regular in-service training on behalf of the Board. Moreover, even though the CEO stated that teachers should be available for in-service training during school holidays and after hours, Jewish Studies programmes were the exception, and those were permitted to take place during school hours. Another religious programme was offered to all staff and was conducted after hours by an *Ohr Sameach* rabbi, with a "right of centre" ideology. The rabbi was well known for his success in bringing many Jews back to "authentic" Judaism. His mandate was to question the ethos of the schools and to be *'critical of [the schools] if he wants to be.*

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[40] A Japanese method of teaching mathematics that uses mostly housewives to operate the programme.
[41] The 1999 figures were taken from the SABJE, Annual financial Statements, 31 December 2000.
[42] The 2000 figures were taken from the SABJE, Annual financial Statements, 31 December 2000.
[43] The figure for 2001 was taken from a document titled: Income and Expenditure for the period Jan–Dec 2001, KDVP, Auditor final, 9 October 2002.
[44] The figures for the first six months of 2002 were taken from a document titled: King David Schools, Expenditure for the Period Jan–Jun 2002 (Head office, Casper and transport expenses allocated to schools), 20 August 2002.

He doesn't have to toe any specific party line or anything'.[45] Teachers who attended these courses were promised monetary reward.[46] An additional bonus was offered to the teacher who showed the most commitment to the Jewish Studies programme. So it seems that while finances were hardly available for individual or secular learning, there were funds for professional development in Jewish Studies and for enrichment programmes that aimed at destabilising the existing ethos of the schools and reconstructing a new one.

Streamlining the remedial services

The remedial departments were restructured and streamlined. The remedial therapists' hours were cut back and the costs of remedial lessons were charged to the parents. At one of the schools parents also paid extra for remedial Hebrew lessons. The number of small classes was reduced at the Linksfield campus, and cancelled at the other two campuses. A surcharge of 20% was charged to parents whose children were in those classes.[47] One remedial teacher maintained that at the beginning the knowledge that the children were paying extra money for the services gave her a greater sense of responsibility to satisfy their needs. A year later there was some disillusionment when she realised that the new system limited the support that the children received, as well as their progress.

Whether remedial services should be offered at the schools, to which grades, who should attend them and whether they were beneficial, was an on-going debate at the schools that had not been resolved. In the past, despite of attempts to coordinate the services, they were managed in an ad-hoc manner. Different policies were instituted at each school depending on the principal, the number of children who needed the support, the severity of the disabilities and the capacity at each school to attend to them.

The CEO's approach to remedial education reflected the interplay between the ideological, economical and educational facets of the restructuring. While research maintains that the causes for learning disabilities could be found in the individual, the system or a combination of the two (Reid and Hresko, 1981), the CEO blamed it

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[45] Manager, 16 October 2002. [Document, 21:21 (439:490). Codes: Teachers - professional development].
[46] Letter to teachers from the coordinator of Jewish Studies, 19 June 2002.
[47] Letter to parents from the supervisor of remedial education, 16 November 2001.

mostly on the system.[48] His argument was that the academic level of the schools was too high; that by offering the services the schools were attracting children with difficulties; and that remedial problems were prevalent at all religious schools because of their tendency to accelerate the learning of a second language (Hebrew). As a solution the CEO suggested lowering the standards of the schools, standardising the curriculum, cutting the remedial services so that the schools would not get the image of being remedial schools, and replacing some Hebrew lessons with Jewish Studies lessons in grades 1 and 2, a policy that was implemented almost immediately after he took office. Moreover, capitalising on the increasing need to cater for children with learning disabilities (not only Jewish) especially at high school level, the CEO in his personal business capacity opened a new, privately owned remedial school in KDL's vicinity, mimicking the remedial facilities that were historically offered at the schools. He was thus seen to be benefiting from the cut in remedial services to the community.[49]

With the reduction in the remedial services, class teachers were left to deal alone with pupils who had learning problems. This was perceived to have pros and cons:

> Look, you always get heterogeneous levels, kids from lower to higher – but we have got kids who are actually in our classes now who are so needy they need individual attention, they need a different pace, they need different skills but they are in the mainstream and they are struggling. They are struggling and their self image goes and their parents come in frustrated and angry and the school cannot offer them what they should be getting, which is special education.[50]

On the other hand:

> Teachers have this idea that they cannot be responsible for children who have learning problems; it is too much for them, so they hand over to the remedial teacher to take that responsibility. And now, you see, they can't do that any more … the child has to be their responsibility in the class, right ... So that is a major change and the teachers are very upset by it, plus the fact that they have fewer frees, you know, so they are very angry people, the teachers.[51]

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[48] Recorded consultation with the CEO, May 2002. [Document 20:61 (1857:1888). Codes: CEO - approach to remedial].
[49] Eden announces SCIP (Small Class Inclusion Programme) – a new school adjacent to the existing Eden College Lyndhurst to start in January 2003. Undated document.
[50] Teacher, 27 May 2002. [Document 14:43 (807:872). Codes: Remedial services].
[51] Manager, 28 May 2002. [Document 5:28 (460:564). Codes: Remedial services].

Outsourced educational programmes

The financial cuts also impacted on programmes that were traditionally outsourced and aimed at the social development of the pupils. Programmes such as "Learning to say No"; an AIDS play for the high schools, Drug-Wise, PEDI (an organisation that educates children about disabilities), etc., were either cancelled or renegotiated. While some of these changes could have been driven by economic imperatives, there was also a clear ideological drive. One stakeholder explained the interplay:

> 'Well, why am I [the CEO] paying out teachers to do it – my teachers should be able to do it'. He [the CEO] doesn't accept this concept of outsiders, or that there are actually people who are experts in certain areas … . So the load on the teachers is also becoming more. Expectations are becoming more. FAMSA (Family Life Centre) won't come into the school. It's ideological as well. 'I [the CEO] don't want some non-Jewish person coming into the school, discussing sexuality'.[52]

The social workers felt that it was important to have experts to deal with issues of sexuality because it is perceived that children prefer discussing sexuality with outsiders. While initially it was agreed that FAMSA would train the Jewish Studies teachers and the social workers to deal with sex education, it was later decided that rabbis and religious psychologists would undertake the training. Consequently, workshops were run during school hours for a few days, but in the end the Jewish Studies teachers and the social workers refused to take on the task of sex education. As a result, sex education who non-existent by the time I concluded the collection of the data for this research.

Reducing the cost of community services

The Jewish community schools ran a few programmes that promoted the notion of care, such as care for the less advantaged, especially among the black community in South Africa (henceforward the outreach programmes); care for the pupils' stable emotional growth, as provided by a team of social workers and psychologists working full time in the system; and care for those who could not afford the fees, as was managed by the subsidy programme.

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[52] Manager, 16 October 2002. [Document 21:40 (726:755). Codes: Restructuring - financial or ideological].

The outreach programme

Following the restructuring the outreach programmes stopped completely at the primary schools. Some isolated activities did take place, but it was up to the individual principals, teachers or parents to organise and fund them. At the high schools, teachers insisted on continuing with the outreach programme *'despite the Board rather than with the Board'*.[53]

The outreach programmes involved providing pupils and teachers from some black schools with educational enrichment and sharing some school facilities such as sporting and IT, with those who could not afford to have them. Funding for the programmes was usually donated; teachers and pupils volunteered to participate; and in some cases teachers received an honorarium from the schools for the extra hours put in. The schools usually financed the transportation. Teachers and principals had different views as to whether these programme were effective or whether it was merely tokenism. For one manager, however, the importance of these programmes was the educational message they gave to Jews living in South Africa. While communal schools are by definition inward looking, she felt that it was important for Jewish children to develop a sense of civic responsibility:

> I think that it is a pity, because we are living in a non-Jewish country and we need to be part of the society. We need to show that we care and … it is important to connect with non-Jewish people, and to give and to care, if we want to be accepted – we have to accept, and not be insular … .[54]

In this view curtailing the outreach programmes indicated parochialism and greater separation between the Jewish community and the broader South African society.

Social services

The social workers' working days had been cut and their salaries were adjusted to match their reduced workloads. For the CEO this was another community service that could be privatised and charged to the parents:

> Social Services – I don't know myself what role it will play. It's clearly a division that has become very large, very expensive, and there may be better ways of doing

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[53] Teacher, 26 August 2002 [Document 31:32 (731:746). Codes: Cost cutting - outreach - non-Jewish organisation].

[54] Manger, 14 May 2002. [Document 3:251 (870:882). Codes: Cost cutting - outreach - non-Jewish organisation].

part of it ... But some of the services offered, could be … charged for at medical aid rates and reclaimed.[55]

Stakeholders had conflicting attitudes with regard to this change. Some respondents objected to streamline the services, as there was a perceived need for social services in view of the crime problem in South Africa, the growing number of hijackings that affected school children and their families, as well as the high rate of divorce. It was perceived that children had become more anxious than they were before, that the teachers were not equipped, and that they had neither the energy nor the time to deal with all these issues. Some respondents maintained that since the services had been reduced, children's behaviour had deteriorated. Other respondents were not sure whether there was a need to have the social workers that often. One stakeholder had mixed feelings, which exemplify the ambiguity between the notion of a community school and the notion of a private school. She objected to what she perceived as a sense of "entitlement" on behalf of parents to expect services from the schools, while at other private schools these services constituted an additional charge:

> I think they [the social workers] do a wonderful job but I think there is a similarity there to the remedial. The parents expect this service and then when they get it they act as if – there is this sense of entitlement at the school – and this is what shocked me … [at other schools] everything extra is extra … and yet somehow people are always saying 'Oh these fees' and 'What are we paying for if we don't have this, that and the other'.[56]

Subsidies

The audited financial statements indicated that the subsidy level was maintained at just over R7 million in 2001 and 2002.[57] The CEO claimed to use a formula to determine what each family could afford and what they were supposed to pay. At the same time there was the attitude that families too must make greater sacrifices. Information on subsidies was never forthcoming. It seems that some parents had to take their children out of the schools or increase their contributions, but a mass exodus did not take place. Paradoxically, while subsidies were being limited, there was a parallel effort to bring new children into the system, especially at Victory Park

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[55] Recorded consultation with the CEO, May 2001. [Document 20:16 (324:348). Codes: Cost cutting - social services].

[56] Manager, 28 May 2002. [Document 5:77 (1347:1361). Codes: Cost cutting - social services].

[57] The annual financial statements for the SABJE for the year ended 31 December 2002. Auditors: Grant Thornton Kessel Feinstein.

in order to increase its enrolment. Board members targeted children at government schools by offering them the opportunity to study at the KD schools for what it would cost them to be at a government school, thereby recreating the same problems that affected the schools before the restructuring. There were some successful recruits and some disappointments, as the following quotation illustrates:

> 'Listen Mrs So and So, I didn't approach you. I don't need you in the system. I'm trying to help you. I'm not calling you to hear how bad [the school] is. You either want to come to [the school] – if you want to leave your children at Fairways and the government school, why don't you go to – what's that place – the old Sandringham Gardens school – Sandringham High, or Sandview or Sandor or whatever they call it'. I said, 'Go there. There are still some white children there. So go there.' You see, that is my disillusion.[58]

This citation suggests that the restructuring impacted negatively on the ethos of care. Even though the new management used the traditions and symbols of the past, such as subsidising needy children, those were framed with different meaning. It was not the "care" that each Jewish child would receive a Jewish education, but rather a threat that not being in a Jewish school means being in a predominantly black environment. The lay leader quoted above attempted to increase enrolment by exploiting the fear of deteriorating standards at public schools and the flight of white pupils to private institutions.

Capital expenditure

At the same time that educational and community services were curtailed and streamlined, the Board had invested in capital expenditure. It was felt that because there was no money, the exterior of the schools had been neglected and had not kept pace with the other for-profit modern colleges. I think that in general stakeholders tended to agree with this statement. In my interviews I recorded positive remarks such as the following:

> It will be a shop where they will sell uniforms and have fitting rooms for the kids, and professional, it will look good. He has – there was that big tree where we used to park, dangerous, falling over, he had that cut down, he has paved it, he has put beautiful pot plants, not big expensive things … There [are] carports, covering for the cars … I think it is that whole look. He has re-carpeted the Board – those carpets were disgusting. He installed new air-conditioners at the Board. You just walk in there and it looks professional.[59]

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[58] Honorary officer, 20 August 2002. [Document 41:30 (738:788). Codes: Subsidies].
[59] Manager, 25 June 2002. [Document 17:25 (658:698). Codes: Capital expenditures].

> I think that the general appearance of the school is much better … I think it's good to have an environment you know, that looks like it's caring about the child. I think that that's more essential.

However, the timing, the manner and the priorities of these expenditures received less support, as was already discussed in the Chapter 5. Moreover, under the pretext of security, new booms were put up at the schools and teachers had to "clock in" and "clock out" as they entered and left the premises. This was perceived to be another measure of control, which did not increase physical security.[60]

In summary, efficiency gains were achieved by reducing waste and over staffing, and by making teachers "work more for less". Further gains were achieved by curtailing educational input and community services, by diluting the remedial services, by hiring non-specialist teachers and by shifting expenses to the parents. At the same time this section demonstrated that new expenses were created in order to support the glossification and the religious intensification of the schools. This confirms the claim that efficiency is not a neutral measure and it is usually used to advance the interests of one faction of society.

The implementation of these policies was problematic and in many cases the schools changed just enough to comply with the demands before reverting back to their old habits, overtly or covertly. It is evident that the means to create greater efficiency and cost savings were frustrated by the culture of the organisation and by the stakeholders' agency. Fullan (2001:ix) speaks about the leader dilemma: *'On the one hand, failing to act when the environment around you is radically changing leads to extinction. On the other hand, making quick decisions under conditions of mind-racing mania can be equally fatal'*. As was illustrated in Chapter 3, the previous Board was aware of all the problems but failed to act on time to avoid crisis. The CEO, not being part of the school community, was able to apply the cold logic of business in order to save the schools financially. But in the process he lost the trust and loyalty of the employees. This suggests that at times of crisis when stakeholders are required to make great sacrifices, they need a leader rather than a manger; they need integrity rather than charisma. Unfortunately, it is also when a community is

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[60] Teacher, 27 March 2003. [Document 70:15 (461:476). Codes: Capital expenditures].

vulnerable and desperate that is can easily fall into the hands of opportunists who would use the crisis to their own advantage.

Centralisation versus decentralisation

As mentioned in Chapter 3, previous attempts had been made to decentralise the Board, to separate between its national role and the governance of the KD schools and to devolve the decision-making process to school level. However, this was discouraged mostly for ideological reasons and for fear that the schools might lose their exclusive Jewish character and mission. Yet, while the centre continued to possess strategic powers, each school was relatively free to develop its own character. This depended on the principal, the teachers and the student population.

Following the Isaacson Report,[61] which recommended devolution of coordination, there were expectations that decentralisation would eventually follow. It was announced that principals would be given more authority and budgets. Instead, greater centralisation took place. While the "old" professional officers were dismissed,[62] new functionaries took office. The different titles that were assigned to the newly promoted staff reflected more managerial discourse:[63]

- The designated Jewish Studies coordinator who had returned from a year of study in Israel took up his new position as the director of Jewish Affairs at the pedagogic centre adjacent to the Board building. An additional Jewish Studies coordinator for the nursery schools and the Foundation Phase (grades 0–2) was appointed. She was later (January 2003) promoted to become a principal of one of the nursery schools.

- The coordinator of Special Needs, whose department the Isaacson Report described as a model of coordination based at school level, was promoted to become a supervisor and received an office adjacent to the Board building. Significantly, she was unable to achieve her notion of supervision and resigned a year later.

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[61] See Chapter 3. Brian Isaacson, Aligned Leadership (22 March 2001). SABJE – Re-positioning, Review and Recommendations, Unpublished printed copy of slides.

[62] Namely, the director; the financial director; the administrative director; the coordinator of General Studies; the coordinator of Hebrew Studies and the coordinator of Social Services.

[63] There could be some inaccuracies with regard to the functions of the new Board employees. My information was gathered from various sources outside the Board such as casual conversations, the Board's telephone directory, other interviewees' reported dealings with the Board and letters, including a letter from the CEO, dated 22 June 2001, titled: Proposed restructuring of the SABJE – New structure of SABJE.

- Two newly appointed financial managers replaced the financial director. The responsibilities of the existing human resources officer increased to include teachers' remunerations and contracts.

- The coordinator of Social Services replaced a social worker that retired at one of the schools and continued with her reduced coordination activities. It was clear that she was able to maintain her job because economically she absorbed one salary at the school level and was able to work "more for less," and she was politically "neutral" since her office was not in the Board's main building and she was not involved at executive level.

- The administrative functions of the Board were distributed between: the new bursar and his new assistant; the CEO's brother-in-law whose function was unclear to my informants and who left the Board the following year; the new public relations officer; the retired principal of the KDL High School who was put in charge of the King David Schools' Foundation, collecting funds for needy students; and later on (May 2002) to the retrenched ex-deputy principal of the KDLJ school who had no definite role but handled various functions such as debt collection, the Skills Development Levy and the Board conference. The latter three were employed on a part-time basis.

The dismissal of the Hebrew and General Studies coordinators indicated the decentralisation of the secular/national and the academic functions, but at the same time the new appointments pointed towards greater centralisation of both religion and finance. It is therefore safe to argue that the restructuring was both economic/managerial and ideological from its inception, though this may not have been perceived as such by a number of respondents. As soon as the CEO encountered resistance, he attempted to control every aspect of the organisation, including the speakers at each school assembly, despite of the on-going rhetoric of decentralisation. In the next citation the CEO spoke about *'total freedom'* for the schools, yet he could not name one function that would be devolved. Significantly, while policies would be made at the centre, the principals could choose *how* to implement them:

> [A principal] believes that each school should have total independence in their own running, and I made it clear it will never be in my time. There are certain areas that affect this organisation – ethos, Jewish Studies, Hebrew. The decision on who studies Hebrew at what level is not a school decision; it is a common decision. The implementation of the Jewish programme – it's a common decision. On the other

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hand there may be other decisions that you can leave to the school. For example … we believe the school should have sport of a certain level, *how that is achieved* by the headmaster, it doesn't come to the very core of our organisation, as long as it's taking place. And there may be others that we say you have *total freedom* on. *But* for example, SRCs (student representative council) – I already told the headmasters. I believe it's a common core decision and they are going to have to sit together – and I don't care if they hit each other – but at the end of it, they have got to come up with an accepted principle that will go throughout the whole system … And if they can't at the end of the session, I make the compromise. And that's it. But we can't have differing systems. Sorry.[64] (My emphasis.)

By decentralising the implementation of policies initiated at the centre, the CEO was able to distance himself from unpopular decisions; the messengers were blamed for mishandling the process. Thus, for example, the school management was blamed for the unhappiness surrounding the cancellation of long leave:

What wasn't correct, is that [the manager] suddenly started phoning people in the middle of the holidays, and telling them: 'You will be on leave from the 1 September to the whatever'. It was handled incorrectly – not by the Board – but internally … It was flung at us … [The CEO] said leave must be used up. There's a way of them managing that information.[65]

The next quotation was quite telling. I was interviewing an Employee Forum representative on the day she had to pass on information about salary increases. She described how she had to deal with people's anger and frustration:

There was a strain … We've been waiting for this increase since the beginning of the year – and today was the day. Ya! There's been a lot of tension, I feel, and me, I had to report back after the Employee Forum on Friday, and some of the teachers were up in arms. I reported that there would be a rise from 0 to 25%, which never took place anyway, I'm sure. There was great outcry. I was being screamed at. And I said: 'Please understand, I'm only the reporter. I'm just reporting back. It's not me. You can negotiate yourself. You can go and see for yourself, but I'm just reporting'. But there are quite a few hot-headed people ... .[66]

The evidence suggests that the CEO was also hiding behind the schools in order not to come out into the open about the ideological changes that he planned to institute, as one respondent illustrates:

For example, singing – girls cannot sing, and if they sing it must be in a group and behind a microphone. And you must not say that it is because of the *hallacha*, but you must say that it is school policy. And it is a way that parents should not go to him, so the school must take the responsibility and in short the school becomes the punching bag, the one in the middle.[67]

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[64] Recorded consultation with CEO, May 2001. [Document 20:98 (3166:3193). Codes: Centralisation vs. decentralisation].

[65] Teacher, 24 October 2002. [Document 49:7 (304:333). Codes: CEO - instructions misinterpreted by messengers; Process - teachers to take long leave].

[66] Teacher, 30 July 2002. [Document 48:21 (452:488). Codes: Teachers - salaries].

[67] Manager, 14 May 2002. [Document 3:221 (111:129). Codes: Board - hiding behind the schools].

Based on the changes in the South African context towards decentralisation and the establishment of democratic school governing bodies (SGB), many parents expected the establishment of similar structures. The PTA meetings became a forum to express these demands. In reaction, the CEO attempted to undermine the power of the PTAs by restricting them to fundraising alone, and by not allowing them to discuss school matters at their meetings. As alluded to in the Prologue, some schools obliged but others did not. Moreover, the Board took over the collection of the PTA levy and only redirected a small amount back to the schools. Once the Board was in charge of the money, the PTAs' powers were further restricted.

To sum up, despite expectations of decentralisation, a movement in the opposite direction took place, whereby the CEO attempted to control every financial, educational and ideological aspect of the schools. However, while decisions were made at the centre, it was up to the schools to implement them without any assistance or direction. It is evident that the rhetoric of decentralisation and the practice of centralisation was meant to change those in power, to weaken the professional voice and any voice that had some knowledge or was vociferous enough to offer some kind of resistance, and to allow the CEO to hide behind the schools, thereby distancing himself from unpopular changes. The evidence also reveals an attempt to silence the voice of the parents and the broader community. Attempts to control what stakeholders said or thought to that extreme could only be considered as a desperate move indicating a loss of control as well as a sign of irrationality. It is clear that this kind of authoritarianism would eventually burst in a context where the concepts of democracy, decentralisation, transparency, accountability and a stakeholder society had become common buzz words.

Goal setting

The goals and the mission of the Jewish community schools tended to be broad enough and vague enough to accommodate the diversity that existed in the community. This is referred to by Strike (1999) as *'thick and vague constitutive values'*.[68] As was mentioned in Chapter 3, the main mission of the Board was to provide *'Jewish education based on broadly national traditional lines, it being*

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[68] For the discussion see Chapter 2 of this dissertation.

understood, however, that the Board will render educational service to any institution which requires and applies for such service'.[69] This phrasing was selected as a compromise formula in order to appease the different factions within the community, that is, the Orthodox, the Reform and the secular Zionists. It also had an economic rationale, as it meant *'not to frighten the people off, because the average South African out there was more interested in the rugby team than anything else'.*[70] Subsequently, the Board's *'statement of philosophy'* dealt with ethos rather than with clearly defined goals, and with lofty and vague ideals that could be open to interpretation:

> Our goal is to develop well integrated young Jewish men and women who are moral, ethical and humane, observant of their religion and their culture, earnest in their relationships with God and man, committed to Jewish survival and Israel's well being, conscious of their responsibilities to South Africa and her people, advocates of the best that Western civilisation represents, stimulated to make learning a lifelong occupation and endowed with academic skills and personal qualities to fully realise their potential.[71]

As alluded to in Chapter 2, a community's ethos is often elusive and implicit, but it creates a narrative for the members of that community. Often, members of the community can understand and act upon the narrative, yet cannot describe it in words or in any tangible manner. However, when the schools' ethos was threatened by the restructuring many respondents were able to verbalise what could be lost. The loss was mostly described in terms of social capital, care, relations among stakeholders, social conscience and all-round education. Respondents emphasised the arts and culture, the shows and assemblies as the spirit and the ethos of the school that had been threatened. The following quotations attempt to provide some respondents' experiences of King David. They reveal a mixture between what was described by one respondent as the "conceptual" Jewish community and the "real" Jewish community. The conceptual community school referred to the acculturation of children in terms of Jewish values, having a respect for and sense of belonging to the Jewish community, as well as a sense of Jewish historicity. While in the real Jewish community, parents wanted their children to have success in sports *'and to be achievers, and if they are not achievers, at least to be happy, and if they are not happy, at least to participate …'.* The respondent was not sure whether these two

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[69] Minutes of the fourth session of the seventh national conference of the SABJE, 4 March 1945.
[70] Other stakeholder, July 2002. [Document 25:21 (440:530). Codes: Ethos - national-traditional].
[71] SABJE Strategic Planning 1993.

views of the community were completely out of sync or whether there was some congruence between the real and the conceptual community.[72]

> No-one can actually define what it is about King David that you choose to send your child there ... For me it was because I was there … A lot of people can't define why King David – but they know that they were happy there … But also what I find with King David and ex-Davidians, is that there's a bond ... .[73]

> I think that the Jewish ethos is learning … I think that we have to maintain the ethos of the school as a nurturing environment. It's not just the results that are important. It's the Jewish nurturing – charity, nurturing … .[74]

> My son said to me just the other day … how fantastic [the school] is – and he said: 'Dad, you know that every teacher knows my name' … it's those sorts of issues, which you can't measure. It's not an academic outburst, but there are so many added values … and it's significant.[75]

> I've defined [the ethos] as clear as a bell. That it's the bridge. That it's something which is sufficiently amenable and accessible to the whole community. It's a bridge that people can climb onto just by going to the school. And then you can decide how you walk across the bridge.[76]

> The essence of King David is a community school, not a college. It works on a tremendous amount of interaction between staff and pupils and staff and staff.[77]

> I remember in the apartheid days – people at the Board going mad with [the principal] bringing in extremely left-thinking people to make statements, but they were making the correct social statements – so King David was at the forefront of social consciousness in education – academic education. The arts and the culture and the links to Israel – everything was in place.[78]

> And there's just a soul at that school that you won't find ... Yes, It's been good for some [children] and not for others. I just feel that it's a family. It really is a family. And your joy is everybody's joy – your sorrow is everybody's sorrow. And that's what Jewish community life here is all about.[79]

> I just loved the rugby. They were great at rugby. We won.[80]

> If I had children at school age now I would send them to King David. Not for the academics – for this I rely on the children, but for the social development. To be among Jewish people; for all the extra things that they are doing; for the encouragement that they are receiving.[81]

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[72] Other stakeholder, 10 January 2002. [Document 7:97 (131:184). Codes: KD - as a community school].

[73] Parent, 15 November 2002. [Document 44:52 (1725:1740). Codes: Ethos - definition, static or fluid].

[74] Teacher, 14 April 2002. [Document 13:57 (601:618). Codes: Ethos - individual attention].

[75] Parent, 21 October 2002. [Document 43:5 (92:100). Codes: Ethos - individual attention].

[76] Parent, 31 January 2003. [Document 63:27 (610:633). Codes: Ethos - national-traditional].

[77] Teacher, 27 May 2002. [Document 14:21 (438:453). Codes: Ethos - relationships and interaction; Ethos – teachers' dedication].

[78] Community leader, 8 May 2002. [Document 10:32 (393:410). Codes: KD - all round education].

[79] Teacher, 8 January 2003. [Document 51:6 (316:332). Codes: Ethos - relationships and interaction].

[80] Community leader, 18 July 2002. [Document 23:35 (756:757). Codes: KD - stakeholders' expectation of schools].

[81] Other stakeholder, 20 December 2001. [Document 62:1 (13:17). Codes: KD - reputation - general].

As implied in the last citation, the ethos was hardly about academic excellence, even though the schools had to produce results to ensure that pupils received *'a good all-round education which can get them the jobs in Australia, Canada and the USA …',*[82] or at least to ensure that the pupils would go to university, or *'have sufficient skills to earn a living'.*[83] As a matter of fact, the means to achieve these academic results were often criticised by parents. Some parents compensated for this deficit by sending their children to extra lessons, either at or outside of the schools. While there were pockets of excellence and some exceptional teachers, it was perceived that some families benefited from those more than others.

> I don't believe that the King David education is perfect … I've had three children at King David … my baby could study [my other daughter's] notes and get 100% for all her tests – because in a time frame of thirteen consecutive years, the notes have not changed.[84]

> I don't think you can rest on your laurels, on the fact that you have done well. What is the big deal? Is there one Jewish day school in the world that gets bad results? I have never heard of one … I say to them, you really want to know how they got those results, go see how many of them are going to extra lessons in how many subjects … The children are motivated, they come from very motivated homes. They come from generations of educated parents. They come with a whole genetic inheritance of thousands of years. What, are they going to do badly? If they didn't get these distinctions, then you have to have an inquiry.[85]

> I don't know. What is so amazing though … is how much success King David does have even under all these machinations, all these struggles. I mean, it is a successful school. It always makes me wonder … how they do it.[86]

> It was a wonderful institution but they rested on their laurels, they never moved forward, there was no challenging leadership anywhere. It was one *Schlimazel* (useless person) to another *Schlimazel* and that is what happened. And if you went in with exciting ideas you were stamped on.[87]

Based on the above quotations one is tempted to describe the KD schools as "sand schools" (Slavin, 1998). These are complacent schools in which the school staff feels as though it is doing and has always done a good job. These schools generally serve high socio-economic status areas, yet may not be tapping into the full potential of their students. Slavin argues that most reforms in these types of schools are doomed to

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[82] Parent, 8 November 2002. [Document 32:5 (262:284). Codes: KD - all round education].
[83] Community leader, 28 January 2003. [Document 60:16 (433:437). Codes: KD - reason for attending the schools].
[84] Lay leader, 20 August 2002. [Document 41:21 (577:596). Codes: KD - academic achievements].
[85] Manager, 11 March 2003. [Document 68:29 (1031:1085). Codes: KD - academic achievements].
[86] Manager, 28 May 2002. [Document 5:44 (674:690). Codes: KD - academic achievements].
[87] Teacher, 17 July 2002. [Document 35:3 (27:35). Codes: KD - need to be improved].

failure since it is like *'building a structure out of sand'*. Sand schools are not necessarily ones that are failing. Complacent "sand schools" are almost by definition succeeding with many students and many have islands of real excellence.

For one observer, the ethos was so bland that it did not say anything.[88] Whether or not the ethos should be made more explicit was debated by one respondent who felt that teachers, *'not only the Jewish Studies or Hebrew teachers and not only the Jewish teachers in the school – have a very keen sense of what the school is there for'*.[89] He concluded that:

> I think that had it been or were it more explicit – it could be stronger. I always felt that there was a great deal of convergence among all teachers and all members of staff in terms of that. But it's very often implicit convergence … If one can talk about it more one can be aware of it more ... I think there was – or is – a problem with the ethos of the school. And I think that somebody once said that we are now going to talk about all those things that go without saying – to make sure that they are still going ... .[90]

A report by an Israeli Task Force[91] remarked on the same ambivalence between mission and ethos. It maintained that at times the word "ethos" was used for conservative purposes and as a way to resist change:

> If ethos means no more than a comfortable accommodation with traditional forms of South African Jewish identification and religiosity, then leaving things alone may be inappropriate if those traditional forms of Jewish life no longer speak adequately to a new generation and are no longer viable.[92]

The CEO was quick to use this vulnerability and ambivalence by questioning the existence of an ethos and its implementation. Confused and implicit identity became a non-identity. In the following excerpts the CEO reiterated his contractual obligation not to change the ethos, but after debating it with himself he decided that there was no ethos to preserve. This again is reminiscent of the tactics used by fundamentalist

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[88] Other stakeholder, 9 December 2002. [Document 22:13 (193:216). Codes: Ethos - definition, static or fluid].

[89] Other stakeholder, 10 January 2002. [Document 7:6 (209:222). Codes: Ethos - definition, static or fluid].

[90] Other stakeholder, 10 January 2002. [Document 7:109 (228:297). Codes: Ethos - definition, static or fluid].

[91] In 2001, the Israeli government sent task force teams to South Africa, Argentina and France – three countries that were perceived to be affected by global and local conditions – in order to have a better understanding of the needs of the communities and to offer assistance. The task force to South Africa arrived in November, in the midst of the retrenchment process. It consisted of three professors representing diverse religious attitudes with vast experience and knowledge in Jewish Education. Their report related to the whole Jewish education system in South Africa.

[92] The Jewish Agency for Israel (February 2002). Task Force Report: The South African Jewish Day School System, (Final Draft). 24.

groups to destabilise the identity of those whom they would like to convert, as described in Chapter 3.

> It's 100% clear that the ethos and mission of the school remains unchanged. Rather than that, it may be intensified. So in other words, if you ask different parties, 'What is the ethos of the school?', most parties give different views. [There is a] lack of understanding of the position of King David and a perceived need to have a vague definition so as to include all the community ... .[93]

> But it's critical that those things that we stand for – the so-called ethos – that we are seen to be doing well ... But I can tell you the information I've got already at the moment doesn't paint a very pretty picture of the implementation of the ethos. So in other words, if we might change the ethos – the actual ethos, the defined ethos – there won't be one … And I will tell you my vision. My vision is to enact singularly, the most superb school of its type in the world. I think we can do it.[94]

> Let me tell you in terms of the prescribed ethos and mission of the school ... I had a look at the wording of all that stuff inside. And to me, you have to question whether we have been carrying out that mission – I certainly will not – I am not introducing a new ethos, but it's my intention certainly to make sure that the ethos as it is at least defined, is implemented … to make that workable ... So I am saying, whatever we are doing, it's not just money. It's if we have an ethos, be open. If we've been wrong, let's correct it.[95]

At the same time that the implicit and "wishy-washy" ethos of the "imagined" community schools was invalidated, the CEO prescribed new goals and attempted to impose them by introducing a new employee contract. It was envisaged that through the contract the CEO would be able to stipulate and manage the conduct of the employees, their dress code as well as their teaching habits and relations with pupils. It took two years for the CEO, the labour lawyer and the representatives of the Employee Forum to reach an agreement on what constituted appropriate behaviour. The core values and the goals of the organisation were listed on the front page of the contract. These were not negotiable. The new clear goals of the King David schools were to provide:

- a superior Jewish and secular education;
- a knowledge of the Hebrew language;
- an appreciation of our relationship to Israel;
- a growth in the self–discipline of our pupils;

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[93] Recorded consultation with the CEO, May 2001. [Document 20:18 (54:81). Codes: CEO - views of ethos].

[94] Recorded consultation with the CEO, May 2001. [Document 20:22(493:533). Codes: CEO - views of ethos].

[95] Recorded consultation with the CEO, May 2001. [Document 20:65 (1935:1984). Codes: CEO - views of ethos].

- extra lessons;

- a pleasant environment for pupils and teachers and staff;

- a close liaison with parents;

- extra-mural activities; and

- social services.[96]

The new goals represent a shift from the ideal of developing the character and personality of the student, to a product that takes the aspirations of the "real Jewish community" into consideration, such as a pleasant environment, extra lessons, extra murals and liaison between providers and customers. In the list of goals a "superior" Jewish education is on the same level as "extra lessons", thus merging the "conceptual" and the "real" Jewish community into one. The prescribed goals indicate a shift in thinking from goals as long-term ideals to goals as mostly measurable products.

Another important issue that had to be decided was the borders of the school community. Who were the clientele? To whom did the school belong? This also had an economic imperative as once the clientele was defined there was no necessity to provide for diverse needs. One example was the exclusion of pupils with learning disabilities as described earlier in this chapter. Narrowing the "broadly national-traditional" religious base of the schools could also be economically beneficial, as the schools could focus on a more defined level of observance without catering to different desires.

A discussion as to whether the "broadly national-traditional" ideology of the schools should be changed, never took place in public. The Orthodox establishment could not accept pluralism or relativism and would not even discuss it. For one *Ohr Sameach* rabbi, this pluralistic definition was so broad that it could easily include "Jews for Jesus" and Reform Jews. He even added secular Jews to the list of those who think that they are Jews, indicating an extreme fundamentalist approach.[97] The respondent below sends a message of exclusion to all those members of the school community who would not adhere to the Orthodox dogma:

> I think there is a difference between Jewishness and Judaism and I think where maybe the day schools have failed is that they have promoted Jewishness; you get a

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[96] Employee manual, SABJE. Various drafts from 24 October 2001–31 May 2003.
[97] Jewish day school – what defines success? *SA Jewish Report*, 21–28 March 2003.

> good education; you have a nice *Bar-Mitzvah*, but I don't think they have been as successful in promoting Judaism ... [They promoted] the ethnicity and Jewish South African culture. They've done it well and I don't think they have done too badly on the religion, I just think its too open-ended … I know this may sound a bit harsh but [the Reform] must start their own schools … I think a school has a right to define itself in a way that doesn't necessarily make everybody happy, but it has a constitution and if you feel that you have particular needs that are not being met by the school, then you have every right to start your own school, which they have not done, they've just shouted from the sidelines. I don't think that anything realistically will change. I don't think it will make one iota of difference to the daily life of a kid at the school. [*CH: So why change?*] So that there is a parameter. So it won't be dependant on who happens to be the principal at the time, who happens to be the Jewish Studies teacher at the time.[98]

Realising the adverse affect that the notion of pluralism had on the Orthodox establishment, the Israeli Task Force attempted to offer its support to the school community in order to address what it perceived as *'the splintering of the community'*.[99] The Task Force recommended a decentralised system that would respect the diversity in the community, whereby each individual school should have its own ideological vision within the broad parameters of the school system as a whole.[100] The lay leaders refused to contemplate this suggestion. They maintained that there was no splintering in the community. The perceived fragmentation of the community was denied and the narrative of "homogenous" community prevailed:

> While there has been a remarkable surge on the part of a significant minority of the younger generation towards increased religious knowledge and practice, this has not led, as the task force indicates, to a schism throughout. The non-Orthodox, whether teachers or pupils, are not antipathetic to *Ba'alei Teshuvah*; on the contrary… parents are quite happy that their children wish to be more observant than they are.[101]

The Task Force was also concerned with the exclusion of Jewish academics from the governance of the schools, and the hegemony of rabbis in the leadership of the schools. While the *'regrettable tension between the "intellectual elite" and the mainstream Jewish community'* was acknowledged, it was justified by the participation of leading Jewish academics and intellectuals in pro-Palestinian

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[98] Other stakeholder, 26 March 2003. [Document 66:20 (919:1028). Codes: Conference - changing the constitution].

[99] The Jewish Agency for Israel (February 2002). Task Force Report: The South African Jewish Day School System, p.2.

[100] A similar approach towards diversity was adopted by the Israeli educational system, which since the 1990s had been based of the "politics of difference" (Sabar & Mathias, 2003).

[101] Task Force Report, The South African Jewish Day School System, Comments by Chief Rabbi Harris. Office of the Chief Rabbi, Johannesburg, 21 October 2002.

declarations.[102] Those who might resist the religious "right" were therefore grouped together with the extreme political left and were excluded from the decision-making process.

The suggestions of the Israeli Task Force to acknowledge the diversity within the community and to reflect on *'a clear vision of what the schools are about and the education to which they aspire'* (p.24) were disregarded. The pretext was that discussion and open debate would destabilise the community. This familiar pretext allowed those in powerful positions to determine the goals of the schools, and subsequently, the future of the Jewish community:

> There is a reluctance to discuss these things so as to not destabilise the community. [The task force] was trying to talk about the importance of vision … what is your vision of the school? There is a reluctance – not only at KD – to talk in these terms. I believe that there are some lay people who feel that they will say to the parents what kind of schools they are trying to create and the parents must give their unlimited commitment to this type of school … .[103]

When the Task Force returned to South Africa to report back on its findings, the restructuring process was at its lowest ebb; the lay leaders were trying to re-build the image of the CEO and to ensure a smooth process of election at the 27th Board Conference. Unsurprisingly, the report was not allowed to be distributed to parents and teachers:

> Because the report says: 'You sit down. You decide what you really want. When you've got your strategic plan, vision, mission in place, let's pick out what we can help you with, and do it'. But the King David's … are scared to go out to a public strategic planning process, which is what they should do – what they really need. But they are not yet sufficiently confident to do so. Because there are big issues in the King David's. … I think the vice-chairperson came to these meetings with us, and didn't say a word, other than the fact that she didn't think that it was politically the right time because of the [Board] Conference to enter into a wide discussion about mission.[104]

The evidence shows that the restructuring was an attempt, first, to change the goals of the schools from long term and vague to measurable and tangible, and second, to narrow the borders of the community and thereby provide a standardised and unified type of education that had clear financial and ideological benefits. Setting clear goals and defining borders are instrumental for the establishment of a close religious community. This creates synergy with the corporate practice whereby schools need to

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[102] The Chief Rabbi referred to a group in Cape Town that had signed a declaration of 'Not in my name' against the Israeli policy towards the Palestinians.

[103] Other stakeholder, 9 December 2002. [Document 22:3 (48:77). Codes: Process - creating a vision].

[104] Lay leader, 28 October 2002. [Document 30:46 (330:342). Codes: KD - mission].

define their core business for efficiency gains. It is evident that the voices of the parents or teachers were not taken into consideration, and that the goals were set by the Orthodox establishment by restricting any open debate and marginalising those who might have a different idea, especially academics.

Once the borders are defined, there is a danger that the schools might move towards becoming a "total community", thereby controlling every aspect of the pupil's life. It is in this light that one could view the interference of the CEO with the secular/Zionist youth movement, *Habonim*, described in the Prologue. One *Ohr Sameach* rabbi, who defended the CEO's position with regard to the youth movement, argued:

> If one is spending so much money in order to run a Jewish day school, surely the children should be exposed to Jewish practices and values and therefore the Jewish Board of Education should be entitled to question whether the children are theoretically being exposed to the opposite values by a youth movement … I accept that the school does not work in a vacuum; it is part of the trilogy that has to impact on the child. The three are the school, home and other institutions, such as the *shul* and youth movements. These have to work together to produce a proud Jew.[105]

Accountability

Many stakeholders mentioned the notion of accountability, only to protest about its absence. The perceptions were that the CEO was not accountable to anyone, that the lay leaders who brought him in were not accountable, that the Board members who caused the financial loss were not accountable, etc. There was an on-going demand from parents for accountability and corporate governance. This could be explained by the corporate background of many middle-class Jewish parents and by the hegemony of the discourse. At the same time that the leadership was perceived as not being accountable, many stakeholders agreed with the CEO that teachers needed to become accountable. The following voice of an honorary officer recommended that business practices, such as job description, would make teachers more accountable and the system more equitable. It further confirms what has been suggested in the previous chapter, namely, that respondents accepted the notion that the "school should run like a business" even though they acknowledged some limitations in the approach:

> [The CEO demands] that people become accountable and responsible within their area … I was horrified coming from a corporate environment where I worked for many years … but you know – something like a job description, it doesn't really exist for anybody … If we were to run as a separate business unit, I think all of those

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[105] Jewish day school – what defines success? *SA Jewish Report*, 21–28 March 2003.

> things would be crucial … You've got to have jobs defined, described. Areas of responsibility and accountability clearly delineated … It must happen at Crawford[106]… I think that is how they operate …You can't have one person at Linksfield earning the same as at Victory Park and doing half the work or whatever. I think you've got to have some kind of balance across the board. That's where your job descriptions would help immensely if you knew what people were meant to do, and what their expectations were and it was laid out. … I mean you had to break down every competency – to the things that they did in terms of the actual – the measurable, and to the immeasurable. [*Ch: How would you measure their passion for teaching and care for children?*] It's harder yes … they have to have a passion for teaching … .[107]

The intention was to monitor teachers' accountability through an appraisal system. It was envisaged that performance-related payment would replace the automatic bonus system (13th cheque). The new system was said to "recognise human worth" and to motivate teachers to achieve better results from the pupils. The automatic bonus system was perceived as inefficient and expensive:

> Sustainability is a problem in our system at the moment. Why? Because the bonus is given automatically … we need to get away from an automatic system that automatically rewards, because ten years ago the person was good. Example – I know that matric distinctions are not the be all and end all … However, there is nothing wrong in saying that for a matric teacher, one of the methods of recognition is a reward in that regard. Another possibility would be recognition [when] nobody fails a subject … King David needs a system of recognising those people who put in the extra effort … I am saying by the time our process is finished, there will be a pool of resources available to reward the people who are doing that work … What I do say is you need to have a method of recognising human worth. It can't be arbitrary. Arbitrariness gives rise to nepotism.[108]

There were those members of staff, especially in managerial positions, who clearly supported the idea of accountability and attempted to find ways to use appraisal forms in their schools. Other teachers were not that enthusiastic about the appraisal system, especially since they were told that this would be done through pupil and peer assessments. The primary school teachers specifically disagreed that young children should be evaluating their work. However, none of my interviewees demonstrated a deep understanding of the concept or had a clear idea of how it was going to be implemented. One teacher who understood the notion of "school as a business" in terms of accountability, had difficulty describing what she would be accountable for. The extract from the interview below reveals that in her perception accountability is equated with control, but not with children learning:

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[106] For-profit colleges in South Africa managed by a corporate.

[107] Lay leader, 27 August 2002. [Document 46:16 (659:701). Codes: Teachers - accountability].

[108] Recorded consultation with the CEO, May 2001. [Document 20:167 (2971:3008); 20:104 (3557:3593). Codes: Teachers - performance related pay].

> Well we have got a 45-page document [refers to contract] to read through … and they are going through that at the Employee Forum. So it is in place but it is not in place at the moment … Rules, like there is a dress code, I mean there always was one but nobody ever checked it … there are things like being punctual … he says he doesn't mind, you can have a problem with your car once … He said things, like if you don't just arrive at the class you are then accountable because you are not teaching. Right, it is not that they are counting how many As how many Bs how many Cs you get … That you have to perform and if you perform below your required state, I think, well my best understanding of that was it wasn't how many kids passed or failed but if you went into the class and then sat and read a book and told them to read and you actually were not bothering to teach you are accountable for that. [It would be checked by] forms that have got to be filled in … A teacher appraisal form … They want it that your colleagues will come in and watch you teach but we have all said very firmly that we don't like that idea … Then there was talk of a student appraisal but everybody came down against that because you know it depends on the teacher's personality ... .[109]

Another teacher disagreed with the idea of performance-related pay. The talk about accountability and performance-related pay stood in obvious contradiction to her previous notion of commitment. Once she began to relate performance to pay and realised how little she was actually being paid, it became a demotivating factor:

> Actually in my entire teaching career I have never equated salary with performance, now I am thinking: What I am taking home, why am I sitting there marking books, why I am sitting at weekends preparing worksheets? You know it is … the first time ever I have equated salary with my own personal contribution. It has definitely made me aware of it … And I feel: How come I am working so hard, why am I still putting my whole soul into my work and there is so little recognition from the powers that be … so little money?[110]

When teachers spoke about accountability they spoke about commitment. Yet the commitment was more in terms of community loyalty than in terms of their academic input:

> I must say since I've come – I suppose it's a different ethos because okay, the majority are all Jewish, and they all go to *shul*, and they all have *Shabbat* together or they visit the next one across the road, or they walk to so and so, and everything is celebrated in a much closer community system of spirit. It's far closer than in a government school where Miss Jones just goes in and it doesn't matter what you are – so there's a different dimension to the system … [they are not] accountable in terms of their jobs, but they are accountable in terms of their community loyalty … from an emotive side, which is often irrational.[111]

> … and there isn't a wonderful support system there. You know, if you God forbid have a personal problem, they are fantastic – it's a wonderful staff from that point of view. But as far as educational matters are concerned, there's no support – one

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[109] Teacher, 26 May 2002. [Documents 8:67 (1132:1155). Codes: Impact - more controls now].
[110] Teacher, 27 May 2002. [Document 14:24 (474:496). Codes: Teachers - performance related pay].
[111] Teacher, 16 July 2002. [Document 38:18 (460:475). Codes: Teachers - relationship with colleagues].

supporting the other and propping each other up. Each one goes into his own classroom and does his own thing. You are on your own.[112]

The evidence suggests that teachers at KD tended to work by themselves or in balkanised groups according to their subject or age group. Many of these groups were hierarchical and authoritative, while in some cases there was a real sharing of knowledge and learning. Teachers were internally accountable to ensure that their class did not fall below the average of the other classes. The parents were often used as an "appraisal mechanism". Teachers knew that they were successful when parents requested them for their children, or at least when parents did not complain about them.

In summary, while there were demands for accountability at all levels of the organisation, the prevalent perception was that there was no accountability. The evidence demonstrates different understandings of the notion. While the notion of accountability was acceptable to those outside the schools and to some managers, teachers mostly resisted the notion, especially as it would involve colleagues evaluating each other. In some cases equating teaching with performance negated the traditional understanding of teachers' accountability and had a reverse effect on teachers' performance and commitment.

It is evident that the introduction of external accountability threatens community loyalty and the bonds that exist between staff. However, the data supports Hargreaves's statement that:

> We must not get too nostalgic about the loss of local cultures to impersonal contracts in education. Local educational cultures can be paternalistic, even feudal, in the ways they cultivate compliant loyalty among their teachers and leaders. Too often they have camouflaged incompetence, moving problem teachers and leaders around the system instead of confronting them' (2003:127).

The relations between the teachers at the schools were mostly on an emotional level with less emphasis on learning and the production of knowledge. The challenge, according to Hargreaves, is not to destroy these relations, but rather to use contracts that would combine mutual personal trust with a professional trust, thereby turning the organisation into a professional learning community.

The chapter so far describes the process by which an attempt was made to quickly change the culture and the structure of the Jewish community schools, and to

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[112] Teacher, 21 February 2002. [Document 1:67 (1041:1047). Codes: Teachers - relationship with colleagues].

impose changes that would make the schools more defined, efficient and organised. In this envisaged new "McDavid school", efficiency meant that time and human capital would be optimally managed. Human worth would be rated by appraisal forms, by pupils as well as by colleagues monitoring each other's performance and behaviour. Quantification and calculability meant that the schools would be divided into cost centres, thereby ensuring that everything could be measured and costed. This would allow for competition between schools and departments and would reward the winners while exposing the losers. Predictability would be achieved by emphasising systems, clear goals and the standardisation of educational outcomes. And the bottom line would be the profits achieved. Yet while this rhetoric was used and was mostly welcomed by stakeholders outside the schools, the school staff experienced it as negatively impacting on them, on the academic input as well as on the community ethos. The following section will therefore explore the impact of this restructuring on the teachers and on the parents.

The impact on the stakeholders

This section examines the impact of all these managerial practices on the stakeholders and how it affected the relationships between them. I applied the notion of impact – that is, the short-term outcomes – as distinctive from effects, which refer to the long-term consequences of an intervention.

Impact on teachers

The data reveals three distinctive phases in the teachers' responses to the restructuring. The first phase was the trauma and shock of the unexpected restructuring and the ruthless way in which it was imposed. This negatively affected teachers' self image and sense of security. In this phase teachers' relationships were strained. This was followed by a period of adjustment, whereby teachers who stayed in the organisation regrouped themselves and became more cohesive, but with an uneasy feeling about forthcoming changes and suspicion about snitchers. In the third phase there was resignation. Teachers felt tired and compromised as, on the one hand, they had complied with the demand to present a positive view of the schools and, on the other hand, they had lost trust in the management of the organisation. While this applied to the majority of teachers there were those teachers who maintained that the restructuring had not impacted on them at all. Certain teachers positioned themselves

strategically to benefit from the new regime and to use the restructuring to advance their own positions. The following quotation represents this view, wherein the respondent gauged the changing scene and decided on how best to handle it and survive:

> I mean from the beginning everyone was shouting and carrying on … I just decided that this is the only person, not the only person, but if not for him nobody would have a job, so it had to be done. My feelings about him – look I have a very good relationship with him and I think he has been quite respectful of me and I am respectful of him … I didn't know who he was, his record was as a good businessman I thought, well, this man maybe could save it. And then people started to sort of fly out of windows and suddenly it got scary. But it is not arrogance … I have never been nervous … I don't like the way he is doing things and there are certain people that I work with that he has just mowed over. I think with him you have got to be quite assertive and you have got to be very visible. If you are not he just discards you. So I don't like the way he is doing it but I can't fault any changes that I have seen; I can only see them as positive changes.[113]

A traumatic experience

As alluded to before, teachers generally accepted the rationalisation and the cost-cutting as an unfortunate but necessary move to save the schools. What they mostly rejected was the contemptuous attitude of the CEO, the management by bullying, the lack of communication or consultation, and the impulsive manner in which decisions were made. Moreover, teachers were mostly upset about the encouragement that parents gave to the CEO in his first address to them, in which the CEO attacked the teachers' dedication, privileged working conditions and their teaching abilities. During this first stage of the restructuring the teachers felt isolated and degraded. They felt they had become '*a nonentity*':[114]

> Nobody cares. And I think the bottom line is – everyone has realised: (a) – you are dispensable; (b) – your value is minimal. Whereas [the director] gave you value; there's no value. I mean we've been told that we are replaceable – that there are cogs in the wheel. That we don't work hard enough. That we have to stay after school – that if we leave, it's fine – somebody else will come. And it's happening ... .[115]

> The restructuring has made me feel like less of a person in a community and more like a replaceable [part] in a machine … We were marginalised, we were isolated, we felt pushed around and manipulated and we never felt like a part of it.[116]

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[113] Manager, 25 June 2002. [Document 17:12 (448:461). Codes: Understanding - the only way to save the school].

[114] Manager, 16 October 2002. [Document 21:59 (998:1023). Codes: CEO - communication with teachers].

[115] Teacher, 23 May 2002. [Document 12:103 (1148:1162). Codes: CEO vs. director; Teachers - dehumanise].

[116] Teacher, 27 May 2002. [Document 14:14 (338:343); 14:64 (518:524). Codes: Teachers - dehumanise].

There were those teachers who maintained that the restructuring did not affect them personally, but they observed their colleagues as having different reactions.

> I feel that they are tired – that they haven't got that extra reserve. There's been a lot of tension amongst staff where you've seen open arguments in the staff room, which I haven't seen before as much.[117]

One can also detect a sense of denial, the feeling that "it cannot happen to me because I am good", or "I am not of that age group", etc. Yet at the same time there was also a realisation that no one is immune:

> I keep on wandering who is going to be next but I am not really worried. Legally you cannot retrench people unless they are not working according to standard, and if they are at a certain age. [118]

> I don't personally feel insecure, because – they cannot pin anything on me. When I do my job, I do it well, but a lot of teachers are very nervous, you know, because we've got someone [refers to principal] who's above me, who keeps on saying – 'Well, if you don't like it here, you can go and find another job'. And teachers are nervous … The fact that people were just dispensed with – people who we thought were indispensable, basically. We thought they were very good – were suddenly gone! We couldn't believe it.[119]

The anxiety, the fear of losing one's job and the feeling of "being left in the dark", negatively affected the relationships among teachers. There was gossip and a *'lot of back stabbing'* as teachers began to *'talk behind each other's backs'*.[120] It felt as if they were *'vying with each other to hang on to the positions'*.[121]

> It was very much people cutting one another's throats because nobody was sure who was going to stay and people were coming up with illogical things. I felt – you know – this one's older, so this one should go first – and this one is younger – this one should stay.[122]

The resistance of the teachers to the increased load and the humiliation was expressed by gossip, by overtly or covertly ignoring some commands, or by more subtle ways such as changing the way they taught. Teachers were spending a lot more time in the classroom and were *'more conscious of "pacing" themselves differently'*.[123] As was

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[117] Teacher, 21 February 2002. [Document 1:24 (320:328). Codes: Teachers - emotional reaction].

[118] Teacher, 24 April 2002. [Document 2:21 (471:477). Codes: Teachers - awareness of labour laws; Teachers – emotional reaction].

[119] Manager, 21 April 2002. [Document 4:36 (293:299); 4:54 (467:472). Codes: Teachers - emotional reaction].

[120] Teacher, 3 July 2002. [Document 18:36 (797:809). Codes: Teachers - relationship with colleagues].

[121] Teacher, 27 May 2002. [Document 14:19 (392:403). Codes: Process - teachers to reapply for their jobs].

[122] Teacher, 16 July 2002. [Document 38:7 (200:208). Codes: Teachers - relationship with colleagues].

[123] Teacher, 24 April 2002. [Document 2:3 (181:186). Codes: Teachers - adapting to change].

mentioned before, various strategies were used to adapt to the new workload, but generally teachers had difficulty in changing old habits:

> The [manager] said don't give homework where there is too much checking, but you cannot do it … it is more for the teacher than for the child because the teacher can see where the difficulties are, where the child's problem is, if it is an individual problem or a class problem, and what they really learnt, not what I taught … .[124]

One teacher, who from being a "class teacher" had become a "subject teacher", felt demotivated as she could no longer teach the way she liked to:

> It all stems from pushing less group interaction, it is almost like 'Shut up, sit down, listen, I am going to teach you, we have got an hour, we have already wasted 10 minutes', you know, 'Shut up and listen', and that is not how I teach. I can spend a whole hour just talking to the kids. I mean, that is really education, but if I do that I can't do anything more. You can do it if you have got your own class and you can juggle your time, so you will do three sums less but at least you will have had a memorable English or History lesson. … The way I am teaching now is soul destroying for me. Not for all teachers, no problem for some teachers, they always taught like that. I can't say they are not creative, but for me it is very … .[125]

One manager observed that teachers had become uncooperative. There was *'an unwillingness to just give that little extra of themselves which they always did before'*.[126] A number of teachers admitted that they did not extend themselves beyond their prescribed work. This usually affected activities beyond the classroom. There was a fear that KD was losing its uniqueness as a private community school:

> And I don't know whether the restructuring is now causing us to shift towards the government school type of feeling where you just do your job and get out of there, because you know you've got to do it.[127]

While there was a perception that teachers had lost their commitment, one teacher qualified that there might be *'less commitment to the school [but] the same commitment to the children'*.[128] She felt that when needed, teachers did *'rise to the occasion. When we were called to a compulsory meeting or a compulsory fun day, the attendance was as usual'*.[129]

The evidence shows that with the restructuring process, teachers became aware for the first time of labour laws and practices. Most of them had never belonged to a union before; labour issues were traditionally resolved internally. Even though the Employee Forum was established a year before the restructuring, teachers only

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[124] Manager, 14 May 2002. [Document 3:77 (571:582). Codes: Teachers - resistance to change].
[125] Teacher, 27 May 2002. [Document 14:30 (572:589). Codes: Teaching methods].
[126] Manager, 2 July 2002. [Document 6:93 (477:482). Codes: Teachers - motivation].
[127] Teacher, 21 February 2002. [Document 1:92 (309:313). Codes: Teachers - commitment].
[128] Teacher 24 April 2002. [Document 2:50 (237:256). Codes: Teachers - commitment].
[129] Teacher, 24 April 2002. [Document 2:28 (498:500). Codes: Teachers - adapting to change].

began to take notice of it when it was used to deliver the CEO's decisions to the schools. Most teachers felt inadequate dealing at this level. Some teachers used personal connections to consult lawyers. It was perceived that when a lawyer was involved, the CEO *'back tracked because he knew that he was not right, but he was able to scare some people who did what he said … Maybe they do not have somebody to help them with the law, and maybe they needed the money so they took anything'*.[130] In some cases teachers did collect money for legal advice or approached the union. Despite these efforts they felt that they *'got nowhere. Even our union man was fobbed off by [the CEO]'*.[131] The next quotation is quite telling, whereby a teacher who left the school a few years before was rehired as a "contract teacher" and therefore received no perks or job security. The teacher felt isolated, afraid to ask questions in case she would lose her job and unable to deal with labour issues:

> A contract teacher – this is a new term for me. I don't understand what it means. A contract teacher … you sort of feel – you don't feel comfortable actually asking anybody about it … You know I don't want to have to tread on anyone's feet, because I am a contract teacher … I just keep quiet and I say nothing. It's difficult. Maybe next term I'll go and I'll say something about it. Basically, you are hitting your head against a brick wall because you just don't get anywhere … You don't want to broach the subject, because nobody really knows. You know people do not really talk, they keep very much to themselves, and they don't discuss what is going on. It's quite frustrating, because you don't really know whether you've got a position there next year, or what the situation is. … Eventually I just said to my husband: 'You need to come with me'. … Because he's in that field, he knows all the avenues they are taking to try and cut their expenses.[132]

The uncertainty created tension and division among the staff. Some teachers were quiet, others were angry and some just decided to *'ride the storm and see what happens'*. Once the retrenchment process was over the atmosphere became more collegial. The teacher voice below describes that phase. In her perception the *'family kind of feeling'* at her school was able to overcome the adverse consequences of the retrenchment and the staff was able to regroup itself after those *'who did not want to be there anyhow'* left. I read into this a sense of "survivor's guilt" (Vermeulen & Wiesner, 2000) partly manifested in "blaming the victim":

> But it was very much a family kind of feeling amongst the staff and it filtered out into the kids. But then when everybody wasn't certain and everybody was nervous because you didn't know what the change would bring, that feeling just disappeared

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[130] Manager, 14 May 2002. [Document 3:84 (609:624). Codes: Teachers - compliance; Teachers - consulting lawyers].

[131] Teacher, 9 January 2003. [Document 53:13 (327:339). Codes: Cost cutting - leave].

[132] Teacher, 3 July 2002. [Document 18:30 (718:742). Codes: Teachers - emotional reaction; union - support].

> … Everybody was suddenly huddled in different corners and talking, you know, then you realised when we came back in January that it was mainly those teachers that were planning to move out on their own anyway that were umming and aahing, should they, shouldn't they, and they were discussing it with this one and they were discussing it with that one. I mean I am not blaming them but that is just what was going on. Then in January you were all there and you saw who was left. You know, we knew who was left but then we actually physically saw the shrink … Everyone just pulled together and the ethos has come back, that family environment, that helping one another, support; that has all come back.[133]

Even though it was perceived that those who remained became more unified, the divisions and the suspicion remained:

> We've subsequently settled that and I must say that this year the teachers have been more unified than ever before ... they've identified the spokespeople. They've also identified the snitchers in the school ... .[134]

Adjustment

Once the teachers had adapted to the harshness of the restructuring they accepted it and resigned themselves to the changing context. Yet there was an underlying atmosphere and *'an air of negativity'*.[135] The staff was restless. Even though the CEO was hardly seen at the schools there was a feeling that everyone was being watched. Some teachers maintained that the principals began to use similar bullying strategies towards those who did not "toe the line". There was always the feeling of "the still before the storm". Teachers were trying to determine the *'level over which they were not prepared to go'*.[136] The secular Hebrew teachers felt that they were expected to project a more religious attitude. While more accommodation for religiosity was made, each teacher had her own line that she would not extend herself beyond:

> I am not going to lie or pretend that I am religious. I always did the right things and never tried to hurt the *Torah*. I made a combination between Judaism and Zionism. I respect religion, but it is enough, they cannot get into my soul.[137]

However, it seems that teachers were mostly "plodding" along waiting for the schools to settle back into a routine:

> You know a lot of teachers – let me try – the teachers are coping with it. I am not saying they are happy with it. There's a lot of teacher burnout. I feel burnt out, I

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[133] Teacher, 26 May 2002. [Document 8:43 (737:776). Codes: Teachers - emotional reaction; teachers - relationship with colleagues].

[134] Manager, 2 July 2002. [Document 6:80 (1226:1243). Codes: Teachers - relationship with colleagues].

[135] Teacher, 8 January 2003. [Document 51:47 (1400:1407). Codes: Impact - underlying - atmosphere].

[136] Teacher, 23 May 2002. [Document 12:121 (1378:1386). Codes: Teachers - adapting to change].

[137] Journal entry, 23 July 2002. [Document 55:752 (3038:3044). Codes: Impact - on Hebrew teachers].

really do – but I don't think one can do anything about it until the issue really settles down. To me and to a lot of people, there has to be some kind of finality.[138]

There was no finality. After the major cost-cutting exercises – such as the retrenchments and long leave – seemed to have come to an end, new changes were approaching. The dismissal of the deputy principal at the KDLJ school was a reminder to the teachers that nothing was safe or secure:

> Their lives didn't change, what they were having to do didn't change, but a sense of insecurity, a lack of, um, what is the word, identification, all those things happened. People suddenly out of jobs overnight, shattered them and then what happened to [the deputy principal] really rocked the boat for everybody.[139]

As teachers experienced the feelings of loss and insecurity, they resorted to bargaining in order to come to terms with the inevitable:

> No I am not really worried because the time has come, so if I have to go I have to go. But it must be done in a way that leaves me feeling not that I have just been replaced but that I have been valued and honoured and appreciated and all the rest of it.[140]
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> It may sound like all … romantic. I do say to myself every day, that I've got a good job to do – I've got an important job to do, and I'm going to ignore this nonsense – and I believe I'm capable of doing the job, and I have to say that to myself every day. But if you ask me, I probably would be more motivated if it wasn't for [the CEO] … I do see myself leaving the system in two years' time if [the CEO] is still running the system.[141]

Certain teachers refused to be subjected to these kinds of working conditions and resigned. Others threatened resignation or felt that if they could find something better, they would move out. There was a *'constant threat of: "I'm going to leave" [from the Hebrew teachers], and they know very well that there's a dearth of Hebrew teachers'*.[142] Teachers' reasons for staying varied. Some stayed because they did not want to change jobs, others because their children were still at the schools. Most stayed because they needed the money and the employment, because they liked the teaching and the holidays between terms, and because they felt that there were no other alternatives. It is safe to say that many of the school staff contemplated leaving their jobs, but felt "locked into" the system.

Once teachers felt "locked in" they began to count the number of years until retirement, or until their children became independent or until any other milestone in

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[138] Manager, 12 July 2002. [Document 24:41 (812:819). Codes: Teachers - emotional reaction].
[139] Manager, 1 July 2002. [Document 36:23 (1049:1069). Codes: Resistance].
[140] Teacher, 27 May 2002. [Document 14:29 (557:564). Codes: Teachers - dispensable].
[141] Manager, 16 October 2002. [Document 21:54 (920:947). Codes: Teachers - motivation].
[142] Manager, 2 July 2002. [Document 6:94 (483:493). Codes: Teachers - leaving the system].

their lives. There were reports of emotional stress and physical illness.[143] There was anger, depression and helplessness. It seemed that the security net had been pulled out from under teachers' feet. This was even more so for the Victory Park school community:

> It's affecting my house – my property. My attitude. Am I going to have a job? Is my friend going to have a job? … Nobody likes seeing anybody else being retrenched. It's a terribly insecure feeling, and I think it's made everybody feel very insecure … I just know that it's made everybody feel terribly jittery, whereas before you felt kind of secure in a nice kind of Jewish atmosphere.[144]

The loss of security was coupled with the loss of trust in the system. It was observed that these losses were the most significant factors that affected teachers' work:

> Because people don't know who to trust in the system … It obviously impinges on your teaching as well ... They don't know how long they are going to have a job for. They don't know with the talking all the time, whether the school is going to close or if it is going to stay open … There is insecurity and mistrust. Teachers are by nature conservative human beings; they are not aggressive in their strategies. So they have to feel secure that they are getting a salary every month – that their job is secure.[145]

> Living in insecurity brings down the level of the work … I think the teachers' fuses are shorter. And I don't think they are spending as much time as they would like to spend on preparing interesting kinds of lessons. They are just basically fed up. [146]

The general perception was that the staff became *'a demotivated, miserable staff, [that] are not enjoying themselves any more'*.[147] Some teachers withdrew into themselves and did not participate in any action organised by the staff:

> Right, I say to myself: Why do I want to rock the boat and cause an argument for something which doesn't affect me, or can affect my job? So I'd rather not say it. I keep quiet. So I go into a cocoon.[148]

> I think everybody was working under fear … everybody's holding on to their jobs at the different levels, then it's very different. You are not standing together. The message has been passed down. You will do this and you will do that. I think what's happened is – there's an outside fear. Before, everything was blamed on the Board. But now there is a real threat – there is an element of maybe Big Brother is watching you.[149]

However, there were certain teachers who managed to keep themselves self motivated, to ignore the negativity and to surround themselves with positive energy:

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[143] Manager, 15 October 2002. [Document 39:65 (1049:1054). Codes: Teachers - emotional reaction].
[144] Teacher, 30 July 2002. [Document 48:27 (577:593). Codes: Teachers - emotional reaction].
[145] Teacher, 16 July 2002. [Document 38:12 (311:327). Codes: Teachers - emotional reaction].
[146] Manager, 21 April 2002. [Document 4:86 (844:850). Codes: Impact - on academic level].
[147] Teacher, 17 July 2002. [Document 35:16 (468:476). Codes: Teachers - motivation].
[148] Teacher, 16 July 2002. [Document 38:36 (1064:1074). Codes: Teachers - compromised].
[149] Teacher, 9 January 2003. [Document 53:19 (443:466). Codes: Fear of losing a job].

> Well I tried very hard to turn it around and make it positive. And it kind of worked. It did. Even the other teachers, when we had our meetings – it worked. And I would like to think that I've had so much … negative things happening to me – that in the big scheme of things, you know, I just felt I had to get on with it. And I got on with it, and I think I took a lot of people along with me.[150]

It was unfortunate that this teacher had resigned by the end of the year 2002 and had gone to teach at a private college. Another teacher accepted the changes and welcomed the new opportunities that the restructuring had given her as she took over some functions from teachers who had left. For her:

> This year has been a phenomenal year. I mean, it has been stressful but, you know, it is a personality type … Well I have always enjoyed my teaching … but more responsibility has been added. So you think, oh gosh, but when you realise that and put it into practice and you get a function to organise and you organise it, and when it goes off well you get a tremendous feeling.[151]

The teacher quoted below also perceived the changes as positive and was grateful for the opportunities it had given her as she had moved from a teaching position to a managerial position. It is instructive, however, that what she described as professionalism was compliance. Moreover, she intersected her praises of the changes with an acknowledgment of the negativity, which she then attempted to ignore. It seems that the teacher attempted to deny her own moral conscience:

> I find the school looks and feels professional and it is also the attitude of the teachers. They might feel intimidated, they might feel anxious, but they themselves have become more professional. They come on time, … they have to have weekly schedules, they have to have plans, they have to present me with plans. Oh, 100%. People now are more careful. … The schools look better, they are jacked up, they have got beautiful pictures on the walls, they are clean, the black staff are cleaning because the principals are seeing – you know the place has got a different look. … If something gets broken, now it gets fixed. … I mean people don't know what is happening and that makes people feel very insecure. But it has jacked up a lot of people; people have a heavier workload. When I taught three hours a day, I mean it is a disgrace, a disgrace, to get a full salary for teaching three hours a day.[152]

Another teacher could not understand why teachers were resistant to what she perceived to be an improvement. Yet she found it difficult to name what had been improved in teachers' lives except their car parks and the "glossification" of the schools:

> We talk about resistance to change; I don't think I've ever experienced anything like what we've been through in the last two years. But a lot of it is in the mind. It's like

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[150] Teacher, 8 January 2003. [Document 51:34 (987:1003). Codes: Teachers - motivation].

[151] Teacher, 26 May 2002. [Document 8:86 (1461:1482). Codes: Teachers - motivation; Teachers - promotions].

[152] Manager, 25 June 2002. [Document 17:35 (852:907). Codes: Stakeholders - contradicting themselves; Teachers - as professionals].

> what they talk about. It's their insecurities. It's their fears. … In fact, if anything, the quality of their lives has actually improved. [*CH: In what way?*] You know, like in terms of 'parking' (laugh) … If we want books … you can ask. Nobody says no. You know, you can actually … And in general you see the improvement around the school. Things are painted. Things are getting fixed, in the physical appearance of the school.[153]

The positive side of the restructuring was the camaraderie that was created among most of the staff, the feeling that "we are all in it together" in spite of the tensions and divisions:

> The good thing that happened is that the staff is kind of hanging in together because we are all feeling the same. There are no little groups going on their own. We are all the same, we are all actually unified against the Board, against [the CEO].[154]

The feeling of togetherness was not uncharacteristic to the teachers who traditionally seemed to communicate better on personal issues rather than on academic topics. In some cases these informal personal interactions spilled over into the academic arena as teachers, together with exchanging recipes and gossip, also shared their knowledge and practices. With the increased workload, however, teachers had fewer opportunities for this type of communication:

> Now, of course, with the changes in the timetable, we are not free together any more. And it's a big problem, because we used to sit together in a group and say: 'I'm having a problem with x, y and z. How have you done x, y and z?' Now we meet once a week. Not even an hour. The half hour that we had, used to get taken up with meetings with the principal. So there's not even that.[155]

Most teachers lamented the empty staff room: *'You know, you go into the staff room, it's like a morgue'.*[156] Some teachers avoided the staff room in order to avoid the negative feelings, or to avoid the gaze of the principal. But what some teachers missed the most was the sharing of recipes. This signified for them the loss of community and belonging, which had been replaced with a corporate-like environment:

> We really perhaps go for days without seeing one another. And that's not fair … it's where we used to share recipes, and I mean this is a stupid example ... We don't get to see people to share – other than at break – and at break you are so busy doing other things, and meeting pupils ... [*CH: Should recipes be shared at schools?*] The sharing of recipes … it is social. It built a wonderful sort of belonging among the staff, and that is what's going to be missed. It's like working for a business – you know, I always think of these big accounting firms where you arrive there with your laptops.

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[153] Teacher, 27 March 2003. [Document 70:13 (431:460). Codes: Process - after two years].

[154] Teacher, 23 May 2002. [Document 12:150 (1731:1743). Codes: Impact - the school became unified].

[155] Teacher, 9 January 2003. [Document 52:14 (413:436). Codes: Teachers - relationship with colleagues].

[156] Teacher, 4 November 2002. [Document 19:38 (631:641). Codes: Teachers - socialising with colleagues].

> 'Plug in your laptops – sit wherever you like' – you know these new open-plan offices – and perhaps communicate with a few familiar faces, and go home. And that's what it's becoming like, and it's quite terrifying.[157]

As the restructuring evolved the teachers were relieved when parents began to support them:

> It took a year, but I think that when the community started getting involved and putting their foot down, I think that's brilliant. The fact that people have now decided to stand up and take responsibility is, I think, a very important thing … I'm talking of the teachers and the PTAs … . Everybody feels they've got a common enemy. So everybody's speaking to each other better, and working well with each other.[158]

Yet, after a heated PTA meeting the teachers were again blamed for insubordination and for inciting parents and pupils. It seemed that the CEO was attempting to separate the alliance that had formed between the teachers and the parents:

> The next day [the CEO] walked into the staff room with [the vice-chairperson and chairperson]. He was very angry; he was speaking very harshly. He knows that people are talking behind his back – he told the teachers that if they will wash their 'dirty linen' outside, and if they badmouth their school, the parents will take their children out of the school and as a result these teachers will be without jobs. He blamed people for telling lies about him and taking his words out of context.[159]

Soon after that the CEO sent a questionnaire to all parents asking them to indicate how many extra lessons their child had, who was providing these lessons and how much had been charged.[160] The teachers were up in arms again. The atmosphere was close to a riot. By that time the community leaders realised that the restructuring was running into difficulties and joined forces to rescue the failing process. Different initiatives were taken to patch up the relationships between the CEO, principals and the teachers, and at the same time to silence any opposition. In public addresses to parents, the CEO began to praise teachers' cooperation and dedication. Yet, as he complimented one faction of the school, he discredited another. His reference to Rabbi Akiva[161] indicates a lack of distinction between literality (*peshat*) and interpretation (*midrash*), another characteristic of Ultra Orthodoxy's approach to Jewish writings:

> Please join me in giving tribute to all our headmasters, teachers [parents clapping]. We have to congratulate them. To be a teacher for Jewish children is a nightmare.

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[157] Teacher, 4 November 2002. [Document 19:79 (1257:1300). Codes: Teachers - socialising with colleagues].

[158] Manager, 15 October 2002. [Document 39:69 (740:765). Codes: Resistance].

[159] Journal entry. [Document 55:545 (5242:5250). Codes: Teachers - threatened].

[160] Communication from the CEO to all parents, 14 August 2002.

[161] There is a Talmudic passage that tells of a plague that killed twenty four thousand disciples of Rabbi Akiva at the first century ce.

> While the process is going on it is difficult for top staff. But I must compliment them for not exposing their anxiety to the kids. In other schools it did happen. We must not torment the children and add to their anxiety. My wife told me how nice the children are in Sandton. The children of [the other] KD schools were behaving badly … It is part of our culture to be nice to other people, to talk nicely ... It is my appeal to children and parents to be nice to each other. Rabbi Akiva – his pupils died because they did not give respect to their teachers. [162]

The teachers accepted the CEO's attempts at making amends with apprehension and relief. Some respondents were happy to give him another chance, while others felt that this was yet another tactic. The following quotation describes the process and teachers' reactions:

> Since the challenge of the parent body and the threat of resignations at the King David Linksfield campus, he promised before Elul[163] that this was a time of repentance, and he apologises and he's going to change his ways. In a number of meetings we've had recently … he was jovial – he gave in on certain issues very quickly, whilst still holding his own opinion on other issues, and it was a very … ya, normal discussion as would have happened in previous … with [the director] – something which hasn't happened in the last year to the extent that he was quite surprised – maybe shocked that he actually had such a good rapport with the teachers. Maybe he's realising that if he actually does speak – and the teachers are very surprised – yet in the back of everybody's mind is the issue of 'Does the leopard change its spots?' Is this just another method being used in order to manipulate the people around him? We don't know ... He's having lunches and giving gifts to all the teachers. And most of the teachers are saying: 'Thank you very much, and wow ...' but the few teachers who I've asked: 'Are you wowed by this and wooed by this?' The answer is no. They are waiting for the next round.[164]

Resignation

As the second year of the restructuring was coming to a close, the message to the outside stakeholders was that everyone was happy and communication was good. Teachers were busy changing the look of the school report "to make it look like an OBE report card", even though a few teachers spoke about slight changes in practice as well. The CEO avoided the schools but was meeting regularly with the principals. The lay leaders were satisfied at the pretence of an improved atmosphere, even though one can detect doubts in the next quotation:

> But at the moment of the restructuring Phase One has been completed, in other words, [the CEO] is in. He's done what he felt he had to do, and it at least looks financially, much rosier that it did. And I'm told – I don't know how true it is, you will have to ask others – I'm told that the teachers are now much happier – those that are remaining. There was a lot of aggravation – in fact, antipathy. I'm told on all

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[162] Journal entry. [Document 55:653 (3662: 3724). Codes: CEO - complimenting stakeholders].

[163] The last month in the Jewish calendar dedicated to repentance and preparation for the Day of Atonement.

[164] Manager, 16 October 2002. [Document 21:47 (818:856). Codes: CEO - making amends].

> sides, not just from [the CEO], from others – there's a much happier relationship with the staff. I hope that's true.[165]

Teachers were submitting and adapting. They were demoralised and demotivated but tried not to complain. The next quotation is a heartbreaking statement from a teacher who had resigned herself to be without much worth:

> I am a small and insignificant teacher. I am continuing with my work. When I opened my salary slip and saw an increase, I was happy. But even if there was no increase I wouldn't have made any waves, because I am tired.[166]

One teacher, who was fighting what she has perceived as an unfair dismissal, was advised by her colleague not to take the CEO on in a fight: *'Try and negotiate …You don't have to buckle under him, but don't take him on. See what you can negotiate…'*.[167] Another teacher expressed feelings of tiredness, disempowerment and submission:

> I've always been outspoken in the staff room, and really, I'm tired. I'm weary ... And I'm tired of fighting the fight, because I'm getting nowhere either … I have to get on with it. And if it reaches a stage that I don't agree with it, then I will take my children out of the school. But if I want a job, let's say... I must be honest – the fight is out of me a little bit. If you would have spoken to me about this 18 months ago, I was fierce. I'm not so fierce any more because I'm fighting a losing battle.[168]

So while on the surface the schools were being managed more efficiently, principals and teachers were toeing the line; there was an uneasy feeling in the air, one of distrust and suspicion. The resistance went underground in terms of staff demoralisation, lack of commitment and tiredness, waiting for something to ignite it:

> But I am sure something is going to happen. It is like boiling water; eventually the water will burst out of the kettle. People cannot continue like that forever.[169]

Impact on parents

The status of the parents within the organisation was a highly contested issue. Are the parents the customers or the owners of the community school? If they are the customers, what rights do they have? If they are owners, should ownership be given to current parents only or should it include past and future parents? Could real representation be achieved? And above all, who is to decide on these issues?

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[165] Community leader, 28 January 2003. [Document 60:4 (67:78). Codes: Process - after two years].
[166] Journal entry. [Document 55:553 (5144:5150). Codes: Teachers - salaries].
[167] Teacher, 27 March 2003. [Document 70:29 (746:772). Codes: Teachers - compliance; Teachers - consulting lawyers].
[168] Teacher, 9 January 2003. [Document 53:52 (926:950). Codes: Teachers - compliance].
[169] Journal entry. [Document 55:553 (5144:5150). Codes: Teachers - salaries].

As mentioned before, the notion of decentralisation and the establishment of governing bodies began to occupy the common sense of many parents in South Africa. Following the appointment of the CEO and his strategic utilisation of the discourse of new managerialism, the perception was that the schools were becoming more decentralised, and hence parents could influence their children's education:

> It seemed to me that they were giving more authority to the principals, they were also giving budgets. They said they were basically going to treat the schools more as having their own budgets and therefore having more flexibility as to how they managed it … I felt that as long as the principal was in touch with the PTA and was responsive to the PTA, the PTA could have more influence … .[170]

As the restructuring process evolved, however, it became clear that parents in this changing context were expected to be "the customers". As customers they could choose the "product". They could complain if they were not satisfied. But they could not design it or have any ownership of it:

> I believe I can't go to Woolworths and tell them how to run their business because I am their customer … you believe that educators know what they are doing and parents therefore shouldn't get involved unless they can see outright there is a problem … something happens and your kid hasn't had a Hebrew lesson in three weeks.[171]

Yet there was a perception that as customers, Jewish parents had very little choice, and thus they became "locked into" the schools and had to accept what was provided for them:

> Things have changed now. When we were dealing with Jewish education, originally it was a choice. The choice of the Jewish parent to send his child to a Jewish school. Now there is no choice. In the new South Africa, you have got to send your child to a private school if you want a decent education for them. There is now very little choice.[172]

Another community member disagreed. While he acknowledged that *'the government schools are no longer an option'* he maintained that there are *'commercial schools like Crawford … they could send their children there [and] would probably get more value for money'*.[173] He implied that if they did not like the intensification of the Jewish element at the schools, choices still existed – they could leave Jewish education all together.

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[170] Honorary officer, 16 July 2002. [Document 26:7 (111:148). Codes: centralisation vs. decentralisation; PTA - role]

[171] Teacher, 26 May 2002. [Document 8:64 (1093:1102). Codes: Parents - customers or owners].

[172] Lay leaders, 18 July 2002. [Document 23:40 (556:562). Codes: KD - the only choice].

[173] Other stakeholder, 26 March 2003. [Document 66:24 (281:294). Codes: KD - the only choice].

The CEO encouraged the notion of parents as customers. As soon as he encountered resistance from the school staff when they refused to provide extra lessons without extra pay, he sought the alliance of the parents as customers, in order to discipline the providers, that is, teachers and principals:

> We believe it's urgent that I address the parent body, and because of the attitudes of one or two people in [school] management, which I think are destructive … and unacceptable, I am going to bring forward those meetings with parents to make clear what we are trying to do and achieve … Now, I am going to bring forward the parents, and I'm going out to the parents simply to be the judge. I am saying to the parents: 'My dear friends. This is the length of the school day, this is what happens in every government school, this is what happens in other private schools, this is what happens in King David'. I didn't want to do that but I am going to do it. And you will understand that what I am doing is eminently reasonable, I believe. And I will tell the parents – we should be giving extra lessons as part of our fees.[174]

A similar attempt to gather parents' support was used when the CEO encountered resistance to his plans to establish a middle school or a new high school in Sandton. In his address to parents in that area he remarked that even though he promised not to initiate any changes (before the Board Conference), the parents (as customers) could demand it:

> You have the right to develop Sandton. Maybe we should have first a middle school in Sandton. I promised to cool it – the Board made me promise not to make a decision for the next few months. But the debate must begin. It is your decision – the decision of the parents. If the parents so desire a middle school and a high school, I will assist without damaging other schools.[175]

It is evident that the CEO was seeking the support of the parents on selected issues, while on others – such as the *Bat-Mitzvah* ceremony, the cutting of Hebrew lessons, the increased number of Jewish Studies lessons and the closure of the KD Victory Park campus – he just *'went over their heads'*.[176] Eventually, when promises were not fulfilled and when the restructuring began to affect the motivation of the teachers, many parents lost trust in the CEO. They became dissatisfied customers, and resorted to complaining and objecting. While parents' complaints were not a new phenomenon at the Jewish community schools, teachers maintained that the restructuring increased the level of complaints because *'parents know now that they have the right to complain'*.[177] One teacher argued that parents' demands had increased and that these

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[174] Recorded consultation with the CEO, May 2001. [Document 20:138 (3751:3858). Codes: CEO - communication with parents].

[175] Journal entry. [Document, 55:694 (4050:4061). Codes: KDS - High school].

[176] Manager, 2 July 2002. [Document 6:56 (832:837). Codes: Parents - customers or owners].

[177] Manager, 14 May 2002. [Document 3:46 (390:391). Codes: Parents - complains].

demands were now coupled with threats. It was perceived that parents, like other stakeholders, were using the CEO's authority to expand their own authority:

> Whereas in the past they might have demanded, but it was subtle, now it is very much immediate gratification … they want to see their problems sorted out almost immediately otherwise they are going to [the CEO].[178]

Teachers retaliated by maintaining that the source of the problems lay with the customers since *'parents do not have parenting skills'*.

When the parents began to oppose the CEO and the Board, PTA meetings became a forum for open discussion and debate. The CEO consequently sought to restrict the functions of the PTA to managing only the *'magazine, the library, the tuck shop and uniform shops and major projects to enhance facilities for our pupils'* (fundraising).[179] From the past minutes of the PTA meetings it seems that the PTAs before hardly dealt with anything else but funds, library, gardens, etc. As a matter of fact one chairperson was most upset that she had to spend her chair year fighting the CEO. In her perception she joined the PTA *'to have fun and do fundraising'*. The data suggests that parents were happy with their role as supporters of the schools as long as they were satisfied with what they were getting. The PTAs became a forum for opposition and for the sharing of information between teachers and parents only as a reaction to the incoherent and ruthless restructuring. Eventually the CEO attempted to restrict these meeting. At some schools the attendance of teachers was discouraged. Principals were not allowed to speak to the parents. Use of the schools' communication channels was forbidden and in some cases parents had to photocopy and distribute notices and minutes of meetings by handing out copies at the car parks. There was an attempt to restrict the topics that could be discussed at these meetings. This was also not always adhered to:

> The CEO has told certain Chairs that they are not supposed to discuss certain things. I haven't been part of that but our own PTA has not itself censored its activities. We have continued to talk about everything and anything. It may not be having any impact but … .[180]

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[178] Teacher, 17 July 2002. [Document 35:51 (1276:1280). Codes: parents - expectations from schools; Stakeholders - using the CEO's authority to improve their own].
[179] Message from CEO. *Davidian Star*, April 2002.
[180] Honorary officer, 16 July 2002. [Document 26:7 (111:148). Codes: PTA - role].

Paradoxically, the notion of the parents as customers, rather than as supporters, negatively affected one parent who had previously undertaken fundraising for the schools:

> Towards the beginning of the year – I stopped going to the meetings. I felt the PTA had been relegated to this administrative fundraising body. I didn't believe that's what a PTA was. If you want to fundraise – employ someone – raise funds … if [the CEO] is going to make the school into a money-making organisation, Pick'n Pay doesn't fundraise to build new buildings. Why must we fundraise to improve the assets of the Board when the Board is not accountable?[181]

Parents demanded that their voice be heard. One parent argued that since parents are involved in the schools for a period of 15 years (if one includes nursery school) or more (in the case of more than one child), their *'views are deserving of recognition ... not in terms of the day-to-day issues ... but in terms of [broad] policy – what the school should be teaching'.*[182]

There were those stakeholders who did not disagree with having parental input into education, but who could not accept parents' attempts to change the goals and mission of Jewish education. One community leader therefore justified the attempt to silence the parents' voice. In his view the parent body, like a religious congregation, is *'entitled to a say [but] they are not entitled to a veto'*; the same adherence to authority that is required by a religious establishment is applicable to the schools:

> There is nowhere in the world where the PTA instructs the headmaster – never mind the executive committees and what have you. The Board just says to the headmaster: 'This is what you are going to do'. [183]

One honorary officer viewed the parents as a "moving target" while, in his perception, the Board had to remain true to its mission and should not be swayed by the short-term needs of the parents. In this view the schools belong to the past parents who established them, and the executive committee of the Board is the guardian of their trust:

> If parents want to run a school, they are quite happy to get together as a band and go and start a school. That's what King David was – a band of parents got together and decided to run a school. If you want to come to our school, these are the parameters. If you don't like the parameters, fine. For instance there's a groundswell to open the schools to non-Jewish pupils. And the criticism is that the Board is not in touch with the new realities in South Africa. We are very much in touch with the new realities in South Africa. That's why we want to keep this ... This was the mission statement of

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[181] Parent, 14 August 2002. [Document 40:68 (1368:1388). Codes: PTA - role].

[182] Parent, 21 October 2002. [Document 43:10 (291:296). Codes: Parents - customers or owners].

[183] Community leader, 28 January 2003. [Document 60:7 (120:138). Codes: Parents - customers or owners.

> the King David School. If you don't like it – make your own school! You know, these are the ground rules … Because let's face it – every year another 300 or 400 kids come into the school and you have a new set of parents who have their own agenda. A school shouldn't be run by a short-term agenda of parents who think in terms of their particular children. They have a choice of schools. Make a choice of the school which suits your particular agenda. Don't come to King David and try and change the agenda … The Board has to remain true to its mission statement, to its ethos … If we diverge from there, then that is perhaps cause for criticism.[184]

The paradox was that the restructuring was a clear attempt to change the mission and goals of the schools and to narrow its parameters. Were the Board to *'remain true to its mission statement'* it would have maintained its "broadly national-traditional" ethos. This rhetoric was, however, used to silence those who resisted the changes; the pretext was the attempt to open the schools to gentile students. Yet these two aspects could be connected: as the schools became more religious, they would become less attractive to liberal thinkers and to gentiles. The phrase "if you don't like it you can leave" signified a complete change in the ethos of the schools from community schools that attempted to provide for diverse ideological, financial and educational needs, to schools with narrower borders that attempted to provide for the desires of those in power, not necessarily for the needs of the majority.

This raises the question of majority and representation. What constitutes the "parents"? What constitutes representation? Are the PTAs representative bodies?

One parent maintained that the PTA is a self-selected, volunteer group. Parents are not democratically elected, but rather join the PTA:

> But when I say join that is really what it is, as a volunteer. I mean there is no great competition to being elected, it is just a question of coming along to meetings.[185]

For another parent, this was representation because every parent had a democratic right to elect a representative, to be elected or to disagree with the decisions of the PTA. If parents chose not to exercise these rights, that did not make that body less representative. He maintained that even though usual attendance at PTA meetings was very low (between 10–30 parents), major decisions were taken by calling the parents to an open meeting.

Traditionally only a few parents got involved on a regular basis. In many cases it was perceived by some teachers to be for *'their own altruistic ventures, not for*

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[184] Lay leader, 13 August 2002. [45:35 (784:828). Codes: Parents - customers or owners].
[185] Honorary officer, 16 July 2002. [Document 26:1 (11:15). Codes: PTA - reason for joining].

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anything else'.[186] Parents were largely not involved and only helped when they were asked to do so. One parent observed that with the restructuring parents became either more apathetic or more vociferous, while others lost trust in the system and left the schools in anger.[187] The latter was a small group, as most parents were reluctant to take their children out of the schools.

As already mentioned there were a few initiatives from parents to affect the trajectory of the restructuring. Some initiatives were spontaneous, such as boycotting the new uniform or boycotting the graduation ceremony. However, these actions were not effective in the long run, as there was neither consensus nor an organised centre. In the case of the uniform, for example, once special rates were offered to "early birds", parents just went ahead and bought them. The Victory Park Primary School was an exception. They had an organised PTA group consisting of many academics and professionals. When the campus was threatened with closure, more people joined the PTA and established the Victory Park Community Action Group. This unified and organised body succeeded in reversing the decision to close the campus. The group, however, dispersed after achieving its main goal. At the Linksfield campus the teachers and parents mandated a parent/lawyer to represent them. He was successful in postponing the decision to establish a middle school and in ensuring a salary increase for the school executives. In the process, however, he became a personal target to the CEO and his supporters. There is evidence to suggest that one community leader warned the members of the Board's executive committee that this parent was not going to do the cause of Jewish education any good and that they should not have anything to do with him.

Other initiatives, such as the different action committees at the other schools, were less successful. A few reasons were identified for this.

One reason was parents' general lack of knowledge and understanding of the structures, the power games and the history of the Board and the schools. Moreover, most parents were perceived not to be informed of the restructuring process and what was happening at the schools:

> There was a small grouping of parents that were concerned, but the overall grouping of parents just went with the flow. And never mind went with the flow, lots of them

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[186] Teacher, 17 July 2002. [Document 35:69 (1822:1853). Codes: PTA - role].
[187] Parent, 27 August 2002. [Document 46:10 (406:426). Codes: Impact - on parents].

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didn't even know that there were issues or – you know, parents become complacent and they just go with the flow or it becomes unimportant to them.[188]

One respondent perceived the parents as *'gullible'* customers who were easily swayed by the CEO that *'tells them all nice things that they want to hear'*.[189] One manager conceded that only a few parents were aware and understood what was going on, and that that depended mostly on what the principal chose to tell them.

The second reason for the lack of success was the different interests represented in these groups. There was no unity among the parents. Some parents were ready to compromise much more than others. Some wanted strong immediate action, while others wanted to negotiate and send letters:

> I didn't think that the issues were as dramatic as they made them out to be. And I also felt that one didn't need to be as aggressive as they wanted to be. I've always believed that the way that you get things done is through negotiation. ... And this group didn't want things to ride. It wanted action 'now, now, now'. And I didn't believe that that was necessarily always the right way to go.[190]

One parent who was instrumental in initiating the resistance at the Linksfield High School became disillusioned with the lack of decisive strong action. He retreated from involvement maintaining that *'the community will get what it deserves'*.[191] Some parents who realised the strength of the PTA at Victory Park were reluctant to join them because of the liberal views of some of the members and the impression that they wanted to open the schools to gentile students. There was also a division among the Victory Park parents on this issue, as not all parents wanted to open their schools.

The CEO was able to manipulate the different interests to break the momentum of the PTAs or action groups. A participant in one of the action groups described the process as follows:

> Mr… approached the group and he said that he wanted to get involved. From the moment he got involved our group went crazy. There were all these different agendas and these different movements – people pulling this way, people pulling that way … The chairlady… she was frightened and she backed off … Two fathers were called to a meeting with the CEO. They were satisfied by what had been explained to them at that secret meeting, but they wouldn't exactly divulge what had been explained to them. And they in fact went as our representatives and they were therefore accountable to us and to the rest of the parent body. [192]

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[188] Parent, 15 November 2002. [Document 44:4 (205:216). Codes: Parents - apathy].

[189] Honorary officer, 29 July 2002. [Document 47:24 (740:748). Codes: Parents - CEO].

[190] Parent, 15 November 2002. [Document 44:17 (667:693). Codes: Parents - no consensus on action].

[191] Journal entry. [Document 55:898 (1413:1419). Codes: Impact - stakeholders start to face reality].

[192] Parent, 14 August 2002. [Document 40:64 (1209:1224). Codes: Parents - no consensus on action].

Another tactic used by the CEO was to pressurise the principals to control the parents. Once parents realised that the principals might lose their jobs if they cooperated with them, they became less militant and quietened their resistance. It therefore seems that community loyalty among stakeholders was manipulated to gain control and to silence dissenting voices.

In some cases the CEO was able to influence the PTA chairperson to work with him rather than against him. Once the chairpersons changed their opinions they took the PTA along with them. In the following citation one can follow the inner struggle of this PTA chairperson and the decision that she eventually made. What is also evident is the confusion (Is what is happening right or wrong?), resignation, as well as the "despondent dependency" and fear of a future without the CEO, which has already been identified in other stakeholders' perceptions:

> I think that there's been a – in terms of the parent body – there's been a huge turnaround in the way of thinking. There are people that are very negative about everything that happens. But on the whole I've found that there's a lot more positivity, and that people realise that – yes, he came in to change the financial situation. And yes, maybe he did meddle in educational issues. But perhaps it was justified – no-one's saying that it was, and no-one's saying that it wasn't. But as a whole, the school is working, and as a whole we still have a school to send our children to, which we may not have had if he hadn't have come in … But I think that – I also had a lot of change of heart over the year. I was also very political in the first half of the year, and I just sort of came to the realisation that – you know – one has to work with what one's got, and one has to work with the people that you know … I suddenly realised that I'm dealing with the type of man that I had dealt with before, with the same kind of personality … My boss was exactly the same … And the only way that I have found to deal with those types of people, is to not take everything that they say at face value. To constantly question and ask … And I just decided that, you know what – if we got rid of him, who would come? And maybe the person that would come would be a hundred times worse.[193]

Another reason for the lack of resistance was disappointment and disillusionment. Parents tried to resist but did not persevere. In some cases parents even stopped coming to PTA meetings when they realised that they were *'bashing [their] heads against a brick wall, they were not getting anywhere'*.[194] Parents' attempts to find out facts were dampened. It became such *'a hassle to find out facts here. Eventually you get weighed down with the effort and leave it'*.[195] At one point the parents even threatened to use the Protection of Information Act, especially in order to have the

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[193] Parent, 15 November 2002. [Document 44:56 (1892:1949). Codes: Parents - resistance - KDLP].
[194] Parent 3 July 2002. [Document, 18:2 (423:428). Codes: Parents - feel helpless].
[195] Parent, 21 October 2002. [43:25 (663:665). Codes: Parents - resistance].

CEO's contract disclosed and to ascertain whether he had the legal power to affect all these changes, but nothing came of it.

Teachers, on the other hand, were not communicating information. They were not even sure whether parents would give it the same meaning as they did:

> On the one hand I don't think that the parents are aware of what the change is really about. I am not sure that they really understand … Does the parent know that his child is learning less Hebrew? I don't think they know that they cut the Hebrew hours, and the implication, and you are not allowed to talk, because if you talk you will be called to a disciplinary hearing. You are not allowed to approach parents, and you are not allowed, as a teacher, to activate the parents … .[196]

One manager likewise thought that parents knew very little but *'it was not for [him] to go and tell them'*.[197] One teacher conceded that parents were not aware, but there was *'a professional line'* that did not allow her to expose things *'from the inside'*. Furthermore, she was not sure what she could tell them, as it was more underlying change that was taking place. A conspiracy of silence therefore prevailed:

> But you see there's nothing tangible that you can take – in all that we've said now, what can you honestly take and go and discuss, because it hasn't really happened – there are still boys and girls in the choir. You know there – there's still Hebrew – there's still Jewish Studies … There's nothing clear. There's nothing where you can see where it's going yet. From inside, the feeling is that the Jewish Studies teachers are given more and more, because maybe they are seen in a higher light – I don't know. Does that not make for a more religious environment? I don't know.[198]

Parents who were aware of the changed atmosphere became frustrated and helpless. Without any forum to debate, the feeling was that:

> Everything is dead. [The CEO] is trying to weed out those who are in opposition … People don't care – they do not understand the consequences. People are afraid to complain. If you complain – you are going against the party line and you will be pushed out. They are afraid to be put to shame like [the parent/lawyer] … Most people want to turn a blind eye; they don't understand what will happen. They are worried about the marks on the report.[199]

There was also a feeling that there was no one to turn to. While there were some threats to take the Board to court, parents were reluctant to take this option as *'it might have brought the system into disrepute'* and *'we shouldn't air our dirty*

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[196] Manager, 14 May 2002. [Document 3:101 (732:749). Codes: Parents - understanding of the changes].
[197] Manager, 12 July 2002. [Document 24:12 (344:375). Codes: Parents - understanding of the changes].
[198] Teacher, 9 January 2003. [Document 53:38 (873:923). Codes: Parents - understanding of the changes].
[199] Journal entry. [Document 55:389 (860:869). Codes: Parents - resistance].

linen'.[200] Parents eventually began to fear that if *'they stand up and they speak out, their children will be victimised'*. But most of all it was perceived that what parents wanted was a school to send their children to and peace of mind. And for that they were ready to compromise:

> Because at the end of the day people want to send their children to school. They don't want to be concerned with – well, we live in South Africa – will your husband get into your gate at night? Will you be able to make a living? Are you going to be mugged? There's the rise of the Muslim community. The rise of anti-Semitism. It's got so many other issues and I think that the husbands are working so hard to pay the school fees – that they don't concern themselves with the issues. The wives are concerned with – can I afford the Diesel jeans that my daughter or my son wants? But they don't look at the issues.[201]

By the beginning of 2003, most PTA and AGM meetings were either non-existent or had shrunk to a few individuals (except at Victory Park Primary School). The only PTA meeting at Linksfield Primary School was ended abruptly, as the deputy principal could not bear to face parents' criticism. As a result parents at Linksfield Primary were not informed of their right to chose representatives to the Board conference in March 2003. Those representatives were instead chosen by the CEO. The CEO managed to impose his own choice of representatives in most PTAs. His list usually comprised parents who were seen to comply with his demands and excluded those who resisted him. The only place where proper preparation for the election took place was at Victory Park Primary School, whereby parents carefully choose their representatives. However, a new member joined in and was nominated to become a representative. It was rumoured that he had had some professional dealings with the CEO. Unsurprisingly he was the only member of the Victory Park Primary School group who was elected to become an honorary officer at the Board. From the Victory Park High School a young ex-head boy was chosen as an honorary officer, even though nobody could tell me who nominated him. He happened to be a *Ba'al Teshuva* who had worked with the vice-chairperson on a fundraising activity.

The unintended positive consequence of the restructuring was that some parents became involved and motivated to understand and learn about the structure of the schools and their core issues. When they saw that they might lose the schools, they began to care. Parents who usually avoided PTA meetings because *'there's such*

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[200] Parent, 31 January 2003. [Document 63:20 (412:433). Codes: PTA - hiring lawyer].
[201] Parent, 14 August 2002. [Document 40:74 (1499:1518). Codes: Parents - apathy].

a pettiness about it' were interested in joining in when there were *'real, important issues'*. [202]

Another positive consequence was the community spirit that permeated the Victory Park campus and the feeling of togetherness that engulfed the teachers, pupils, parents and the broader community. This feeling was expressed by the PTA chairperson as he described their struggle to preserve the campus: *'It was the best of times, it was the worst of times'*. The forces that attempted to divide the community therefore produced a counterforce of unity.

Vignette 2 follows the middle school policy that demonstrates the autocratic and incoherent mode of change which transformed the initial consent to the restructuring into open resistance. It describes the middle school policy that almost achieved the goal of dividing the school community, including breaking up the relatively strong unity among the executives at Linksfield High School. At the same time it had unintended consequences as it prompted selected parents from all the schools to join together, to create channels of communication, to petition other parents and to lobby the community leaders as well as the Board members. It was this unity that eventually resulted in the CEO's departure.

Vignette 2 – The middle school

Towards the end of the second term in June 2002, unknown to principals, teachers and parents, a decision was taken to divide the Linksfield campus into four units: a junior primary school – Grades 1–3, which was always operated as a separate unit; a senior primary school – grades 4–6; a middle school – grades 7–9; and a senior high school – grades 10–12. This meant that the present primary school would lose its Grade 7, which would form the middle school together with grades 8 and 9 from the high school. Each school would have its own classrooms and administration, as well as its own principal. The new school would begin functioning in January 2003 on the premises of the old hostel at the high school, and would therefore form a separate enclave within the high school. Parents were advised that the Board had already instructed architects to assist them in improving the physical amenities on the campus.[203]

The decision was justified by global and local changes, such as the existence of a worldwide trend towards middle schools; changes in the South African educational system with the introduction of public examinations at the end of Grade 9; the better personal attention that

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[202] Parent, 31 January 2003. [Document 63:41 (972:979). Codes: PTA - reason for joining].
[203] Undated letter from the CEO to parents, titled: Restructuring King David Schools.

could be provided in smaller schools; and by the perception that Grade 7 pupils fit more easily into a middle school than a primary school.

While the establishment of a middle school was presented as an educational initiative that would bring the schools on par with global and local trends, it was not perceived as such. The haste by which the middle school was expected to be established (five months) coupled with the fact that it had not been discussed with the teachers or the principals, pointed towards political expediency rather than educational considerations. However, this policy had unintended consequences as it mobilised the parents to start an open and organised resistance to the CEO. After a stormy PTA meeting at KDLH on 18 June 2002, a committee was mandated to seek a legal opinion on the constitution of the Board and the legality of the CEO's mandate. Consequently, the CEO withdrew his plans and announced that he would institute a proper consultative process in order to decide whether a middle school should be implemented. He recommended that the honorary officers of the Board and the parents surf the Internet for information on middle schools. He claimed to have *'discovered 4,000 sites worldwide'*.[204] While there was some kind of consultative process, the general perception was that a middle school would be established with or without stakeholders' consent:

> And he's sort of – the middle school, he's stepped back a bit. It will happen, but hopefully it will happen with consultation and it will take a form that suits the school. Not a form that you read about on the 'net'.[205]

And indeed a year later, in June 2003, a decision was taken to introduce middle schools at both the Victory Park and Linksfield campuses.

The question on many stakeholders' minds was: Why? Why would the CEO decide to invest in building new structures and employing new managers when the Board still owed about R20 million? Why would a system with dilapidated buildings and dwindling pupil numbers invest in new structures instead of fixing the old ones? Why would a system that had retrenched teachers, remedial therapists and social workers, embark on a new venture that focused on the emotional and individualised needs of teenagers? Why would a system that advocates uniformity and a standardised curriculum, recommend a creative and integrated curriculum which is the essence of a middle school?

The evidence presents several options to understand this decision, which again illustrate the interplay between the ideological, political and economic imperatives of the restructuring.

In economic/managerial thinking, small cost centres are better controlled. Smaller units would require fewer vice-principals and consequently a reduced salary bill. At the same time, the CEO maintained that the middle schools could be implemented with minimal investments:

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[204] Letter to all members of the executives committee of the SABJE, 24 July 2002. Letter to parents, 20 January 2003.
[205] Teacher, 4 November 2002. [Document 19:21 (451:464). Codes: Middle school].

> In view of the fact that all our schools peaked at higher student numbers than at present, we believe that the middle schools can be accommodated at all our campuses if necessary with little further development. There will be a need for more toilet facilities and specialised teaching facilities, such as labs.[206]

This statement indicates limited understanding of the process of educational change and of its hunger for resources. It could also mean that the intention was to have a minor structural change (adding some toilets) without investing in developing new concepts of teaching and learning. Thus, while there could be benefits from the reduced number of vice-principals, no major investment was envisaged for the new venture.

Politically, the evidence suggests that the reason for the middle school was to break the power and the unity of the executives at Linksfield High who consistently and openly resisted the CEO's policies. There is evidence to suggest that the honorary officers of the Board approved the decision to establish a middle school at an executive committee meeting held in May 2002, where the discussion was mainly around the resistance of the high school executives and the insinuation that they incited their pupils to vote against the new uniforms. At that executive committee meeting, in between the discussions about the uniform and the insubordination of the KDLH executives, the middle school idea was mentioned. It was envisaged that the middle school would be a "positive step" towards breaking up the power of the executives. In this way the middle school, the uniform and the power of the executives were interwoven into one issue.

There was a perception that the middle school was a pretext to change the people in power. By creating new structures teachers and principals would have to reapply for new positions. Consequently, the CEO could replace the old management with his own people:

> Many people see it as a way of dividing and ruling. To create two positions. Two headmasters – one will be an appointee of your own … Political, and controlling. I'm not convinced for one minute that it will be for the betterment of the school and the kids. He talks about it being more personal, and the children's needs would be catered for more … I don't believe it … .[207]

This perception proved to be accurate when a year later the CEO sent a memo to all members of staff *'to apply for the principals' positions at primary, middle and high school level'*[208] at both Linksfield and Victory Park, despite the fact that these positions were not vacant.

The CEO continued to insist that the middle school was a purely educational decision. One of the main arguments was that "smaller schools are better". However, the notion of a small school stood in contradiction to the discussions held concurrently on the closure of the Victory Park campus, which had about 900 pupils at that time.

> And then [the CEO] adds afterwards that he's done a lot of reading on the subject and he's realised that the ideal size of a school is 126. Where he got that figure from, I'm not

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[206] A letter from the CEO to Grade 6 and 7 parents, 3 June 2003.

[207] Other stakeholder, 12 July 2002. [Document 24:33 (712:732). Codes: Middle school; Divide and rule].

[208] Memo from the CEO to all members of staff, 25 June 2003.

sure, but that's what he said. I couldn't listen to this nonsense. They were postponing discussion that night on the whole future of Victory Park, because they were so pre-occupied with this one. And the very reason for Victory Park's closure, was that it was too small and no longer viable.[209]

Paradoxically, a year later it was decided to establish a middle school at Victory Park despite the fact that it had become even smaller after rumours of its closure had spread. For some respondents this was perceived as another tactic to force the eventual closure of the Victory Park campus.

There was another perception that ideological considerations had influenced the decision to establish a middle school. There was the view that the CEO was trying to follow the trend of religious schools to place girls over *Bat-Mitzvah* age (12) and boys over *Bar-Mitzvah* age (13) in high school. Some stakeholders spoke about this "hidden agenda":

But some of them were saying this morning – we wonder what the hidden agenda is of splitting the school? Now why should they even think of a 'hidden agenda' if they aren't suspicious because of so many other things that happened? So what's the 'hidden agenda'? In their view – that it will be a boys' school and a girls' school. I don't believe it. As disinterested as the parents may or may not be, they are not going to allow that to happen. It's not what the KD schools are meant to be.[210]

With the lack of clear understanding about the meaning of the policy, the stakeholders reacted to the decision to establish a middle school with the usual ambivalence. Some perceived it as another impulsive decision that was meant to exert greater control on the system, while others perceived it as an educational improvement. Others maintained that the decision did not take the whole school system into consideration and that the unintended consequences that a change in one campus would have on the other campuses had not been explored. The following citations illustrate some of the perceptions:

It is a case of as you settle down and think everything is OK he rocks the boat. I said to somebody 'Where did he get this from, to suddenly throw it out overnight, the middle school'.[211]

He is a control freak. He does not want one person to have all the power. He will separate so he can control.[212]

He only wants to put the middle school in Linksfield. I mean the man doesn't think straight … now you've got Sandton, which is feeding Linksfield and feeding Victory Park. So what do the Sandton parents do? Do they take their child out in Grade 6 in order to join the middle school.[213]

One teacher saw the establishment of a middle school as a positive step. In the following extract it is evident that she accepted the rhetoric without any critical understanding of the change, even

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[209] Other stakeholder, 8 October 2002. [Document 34:7 (190:299). Codes: CEO - Middle school].

[210] Other stakeholder, 15 July 2002. [Document 25:48 (1163:1175). Codes: Middle school].

[211] Manager, 1 July 2002. [Document 36:26 (1118:1121). Codes: Middle school].

[212] Manager, 26 May 2002. [Document 11:66 (589:601). Codes: Middle school; Process - divide and rule].

[213] Honorary officer, 29 July 2002. [Document 47:8 (382:399). Codes: Middle school].

if it meant denying her own experience and knowledge. It shows again the impact of the CEO's charisma on some stakeholders:

> Here is another positive he is doing, he is dividing up the school, 450 children in a unit, which is what they are doing elsewhere in the world. [*CH: Where*?] The whole world. First of all they have done it in Israel... OK, here you can't [in Israel it did not succeed]. I mean that primary school [Linksfield] is out of hand, out of hand, so to me that is brilliant, brilliant. Why wasn't it done before? It seemed to be that they were like this for 20 years, the Board, even though people were being sent to Israel, this and that, but the actual structure of the school was like that. Didn't move, even with all the people who were becoming the heads of this and that, it didn't move. And I am not talking about your department, no, that was a big change and I feel that the pre-school change – but in terms of even the uniforms and the system, I mean I was horrified when I taught at … really I wasn't impressed at all.[214]

Not wanting to be seen as rejecting a policy that claimed to improve the educational provision of the school, the teachers began to debate the issue. The primary schools teachers viewed it as a generally positive change, while the high school teachers resisted it:

> And then, of course, there's the talk about the middle school. Look, educationally I suppose it does make sense … But my argument is that we've never had a middle school – there's never been a middle school necessary – there's always been a system at King David Linksfield which has worked, where one of the deputy principals … was in charge of the lower forms … So there was a middle school in operation, but it operated as one school. Why go and break a winning formula? [215]

> We all broke into groups to discuss a rationale – the pros and the cons of a junior high school and a senior high school on the Linksfield complex. I think the consensus was … that we need a lot more information. We need to see the research. It's not a Mickey Mouse business. It's a serious educational, sociological, psychological – we are moving kids … there will be implications, but we shouldn't just reject out of hand – and you need time to do these things. Why does it have to be [quick] – next year, when nobody knows anything? … How will it fit into the setup? … My sense of it is that he will defer it. But I'm not sure it's entirely such a bad idea … let's face it. If you've got 1,000 kids in this school – unless the kid is a problem or an outstanding student, he/she can go right through and I won't even know that child … There are pros to it. Again, I think it's just the way – they've gone out quickly into print and shooting from the hip. It doesn't mean that the idea is a bad idea – it just needs to be done properly.[216]

> But then I'm all for a middle school, so I think it's fantastic … I think that kids – adolescent children – need special handling and they need special teachers who like that age group ... The only thing I don't think is good, is that they are on the same campus as the rest of the school ... I'm all for a middle school, but not thrown at you to say: 'You'll have a middle school next year'.[217]

The primary school teachers began to prepare the pupils for the middle school by making Grade 6 the graduation year, even though no formal decision was taken and parents were not aware that this was happening. At the same time the teachers were also preparing themselves for the change,

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[214] Manager, 25 June 2002. [Document 17:44 (1044:1062). Codes: Middle school; Stakeholders - buying the discourse].
[215] Manager, 12 July 2002. [Document 24:11 (320:343). Codes: Middle school].
[216] Other stakeholder, 15 July 2002. [Document 25:45 (1007:1097). Codes: Middle school].
[217] Teacher, 24 October 2002. [Document 49:10 (389:438). Codes: Middle school].

even though it was not clear who would teach at the middle school. In one school, teachers were asked to volunteer for the middle school. When none did they were told that it would be their fault if certain teachers lost their jobs. Moreover, no professional development took place and no information was available to the teachers about the nature of the new school. Again, tensions and divisions permeated the schools:

> … the Grade 6s in particular are very upset that they are not going to be the leaders of the school but we are trying to make their last five months in primary school – we want to put on a little Grade 6 play and we want to do a barn dance for them and we want to make them monitors ... We are waiting to be told which of the Grade 7 teachers are going up, which of us choose then to leave because some of them have said they are not going up and they will then leave. But then that is fine because they have basically been negative people all along ... We are waiting to see. I see it as a challenge. I see it as something exciting, maybe different staff members to work with, new ideas, you know because a lot of your colleagues become resentful if you have got ideas for them ... .[218]

When the parents began to hear about the middle school, they were confused. Those parents whose children had passed that age group were relieved that it would not affect them. They did not know if it was a good idea or a bad idea. In fact they had no idea what a middle school was, and they did not trust the CEO to decide for them:

> I've got an open mind to the middle school … but he hasn't convinced me by his single letter … because at the back of my mind, I don't trust him. And that I think is what the issue boils down to – is you can't accept any change he introduces, because you don't trust him.[219]

Unable to deal with the bigger issues or to defer the decision, some parents just wanted to buy enough time to prepare their children for the change:

> But as I say, you know, listen, it's not that we disagree with the middle school. What we disagree with is it being in five months' time. You've also got to sell it to parents. You can't ask parents to buy into something that they have no knowledge of … I do believe that the middle school will happen in the year 2004, but hopefully in the next year we will have sufficient time to prepare the children accordingly. We know – I mean in our minds – I mean he hasn't told us in so many words it's going to happen – but you speak to any senior teacher in the school, they all say: 'Ya, 2004'.[220]

As debate regarding the middle school continued, suspicion and divisions between stakeholders intensified. Everyone was suspecting the other of having a hidden agenda:

> You see [the principal of the high school] … was very scared that in the middle school situation he wasn't the headmaster. It was a very personal thing … for him because (a) he didn't think it would work physically and (b) for him to be a principal of three grades or whatever it was … his own insecurities, because he is on a limited time span. We got to realise that there are no guarantees on where he is going to be and umm he's reached retirement age and you've got to understand that and so has [another principal] reached retirement age, they have all reached retirement age.[221]

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[218] Manager, 17 July 2002. [Document 35:40 (959:1002). Codes: Middle school].
[219] Parent, 14 August 2002. [Document 40:81 (1687:1701). Codes: Middle school].
[220] Parent, 15 November 2002. [Document 44:63 (2223:2293). Codes: Middle school].
[221] Lay leader, 07 March 2003. [Document, 65:21 (785:798). Codes: Middle school].

> We believe that [the primary school teachers] are being selfish. We believe they just want to get rid of their problem kids – because they become a little bit difficult. And they say to themselves – 'What do we need it for?' And we don't believe they are looking out – caring for the kids, and the future of their kids.[222]

Hargreaves (2003) maintains that exclusion of people from participation and decision-making produces a "community of suspicious minds". This narrative reveals that the level of distrust at that stage was so high that any suggestion by the CEO would be considered with suspicion. The debate around the middle school had exacerbated the divisions between and within stakeholder groups, such as the division between:

- primary school teachers who tended to support the change and high school teachers who tended to oppose it;

- teachers at the same school who were excited about new challenges and new opportunities, and those who were concerned about their jobs and were tired after two years of unending change;

- principals that complied and principals that resisted the new policy;

- school executives who were hoping to become principals of the middle schools and between those who felt that they might lose their positions, or would not be able to continue to work under those conditions much longer;

- those parents who put their trust in the CEO, those who had lost confidence in the process and those who were too apathetic to get involved; and

- what people think, say and do.

As mentioned in Chapter 5, the CEO was obliged to defer the idea of a middle school until after the Board conference (March 2003). Soon after, an impression of consultation was given when each principal was allowed 10 minutes to explain to the newly elected honorary officers of the Board their position with regard to the middle school. The principals were not allowed to discuss the notion among themselves or to publicise it. The Board agreed in principle to implement a middle school but requested additional information. The CEO notified the parents that a middle school would be implemented at Victory Park and Linksfield in 2004.[223] Most parents were expecting open debate and consultation and were therefore taken aback by the decision. As I had already concluded the fieldwork for the research, I was able to publish, together with one of my supervisors, an article in the Jewish community newspaper reflecting our attitude towards the implementation of the middle school and towards the other top-down managerial decisions that had impacted negatively on teachers' morale and motivation.[224] It was the first time that an

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[222] Manager, 17 March 2003. [Document 69:22 (569:652). Codes: Middle school].
[223] Memo to all members of staff, 25 June 1003.
[224] Focus on a King David 'middle school'. *SA Jewish Report*, 13–20 June 2003.

article criticising the schools was published in the newspaper since the onset of the restructuring – a topic that I will discuss again in Chapter 7.

In August 2003 we (my supervisor and I) were invited by the PTAs of both the Victory Park and Linksfield high schools to address the parents. In spite of the CEO's attempts to declare these meetings illegal and to threaten the principals and chairpersons with insubordination, both meetings took place with a crowd of about 300 and 500 parents respectively (some parents attended both meetings). The Jewish community newspaper published the proceedings of the meetings, at which was discussed the notion of a middle school and the way its implementation was envisaged. Above all we discussed the divisions and the suspicions that permeated the community and called on the different schools to act together:

> The resolution of the meeting saw the appointment of a task action committee representative of parents from the schools, that would investigate the issue further and if necessary … take legal action against the Board.[225]

A short period followed in which strong statements and open debate appeared in the newspaper, both for and against the restructuring. This brought the tensions at the KD schools out into the open and allowed them to be publicly scrutinised. After the organised and strategic lobbying of the newly established United King David Action Group (UKDAG), the Board suspended the CEO. No explanation or details were given. However, some of the tensions and divisions remained. The following extracts from stakeholders' letters published in the newspaper exemplify the differing views:

> We feel outraged that a man of [the CEO's] calibre is judged by inept, inadequate people who feel threatened by a superior mind … The Second Temple was destroyed by *Sin'at Chinam* (groundless hatred), let us not do the same to our community.[226]

> As we approach the apex of the '[CEO] crisis' one cannot help wondering if history is not repeating itself with the same inevitable outcome … What we appear to have now, then, is a scenario in which the very body which captained the ship as it sank into undeniable financial crisis and then took the unilateral decision to remedy its own mistakes, is once again acting to remedy its second mistake in the very manner in which it attempted to remedy its first: in secrecy and without the informed, express consent of the broader parent body and community.[227]

This vignette demonstrates what research had proved again and again: that imposed change is limited and that coerciveness might eventually generate a counterforce strong enough to stop it. The above quotations are, however, critical as they highlight two important aspects: first, the CEO did not control the school community only by coercion but also by consent; and second, the CEO was brought in and was supported by certain forces in the community for various reasons. Chapter 7 will elaborate on these issues.

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[225] King David: Discontent boils over. *SA Jewish Report*, 1–8 August 2003.
[226] Zulberg judged by 'inept' people. *SA Jewish Report*, 26 September–3 October 2003.
[227] Is history repeating itself? *SA Jewish Report*, 26 September–3 October 2003.

Chapter 6 described the process by which an attempt was made to change the King David schools into a "McDavid"-type school. At the McDavid schools, efficiency gains would be achieved by requiring the teachers to work "more for less", by dividing the schools into smaller cost centres, by shifting some of the costs to the parents, and by narrowing and standardising the educational provisions as well as the community services provided by the schools. The evidence shows that the budget cuts served the political and ideological drives of the restructuring, as they changed the power relations within the institution and privileged those who complied with and supported the new regime. In some cases the efficiency gains were not sustainable, and the schools reverted back to their old habits almost immediately.

Decentralisation and centralisation took place simultaneously. While policies were made at the centre, implementation was decentralised. The educational functions of the organisation were decentralised, while finance and religion were centralised; this was in line with both facets of the restructuring – the economic and the ideological. The implementation process depended on the context of the individual school and the agency of principals, teachers and parents. The rhetoric of decentralisation was used to change those in power and to distance the CEO from unpopular decisions, yet true devolution of power to parents and schools was rejected as it negated the religious facet of the restructuring. In contrast, the managerial demand for a clear mission and goals created synergy with the ideological facet of the restructuring. In the process, the "vague and broad" constitutive elements of the community schools were replaced with "clear and narrow" definitions, which attempted to redefine the Jewish identity of the schools and to exclude those who did not adhere to them. The managerial restructuring was therefore effective at giving religion the upper hand in its historical clash with democracy, as well as with secular Zionism. The managerial logic of parents as customers negated their democratic right to become partners and stakeholders in the education of their children. At the same time it increased their "right to complain". The demand for teachers' accountability was perceived as another control mechanism, which negated the community loyalty and the personal trust among the school community.

This raised the central question that was at the back of my mind throughout the research: Could the restructuring of the Jewish community schools be explained in terms of new managerialism?

In Chapter 2 a distinction was made – based on the conceptual framework of Wallace and Pocklington (2002) – between neo-Taylorism, entrepreneurship and cultural management. The differentiation was based on the mechanisms by which control over others' agency was achieved. In neo-Taylorism, loosely termed "old managerialism", power is concentrated at the top and control is contingent on compliance. The school staff and managers must comply regardless of their own values and practices, or face disciplinary measures. Entrepreneurship uses covert and indirect control offered by the market. It emphasises decentralisation, choice, competition and responsiveness to consumers. Compliance is achieved through adherence to consumer demands. Cultural management – that is "new managerialism" – controls stakeholders by aligning the beliefs and values of the manager with those who are managed. Compliance is achieved through commitment to the creation of a shared vision and by winning both the "hearts and minds" of those who are managed. The Foucauldian's concept of *governmentality* was forwarded to explain new managerialism's attempt to achieve cultural hegemony not by domination alone, but also by self-governance. It was argued that these three ideal types might operate together when policy makers seek to maximise their degree of control.

In the restructuring of the Jewish community schools control was envisaged to be achieved by crude neo-Taylorism, while the rhetoric of entrepreneurship and new managerialism was used in order to draw support for the process. Selected practices within the new managerialism discourse were adopted and adapted as long as they coincided with the ideological restructuring and the cost saving goals. This created tensions, contradictions as well as polarisation and suspicion within the community. Yet, it is evident that the allure of the managerial rhetoric of order, certainty, efficiency and rationality could not be turned down by an organisation in a financial crisis and by a community without financial resources or adequate leadership. The economic/managerial turnaround was vital for the survival of the community schools. However, the implementation of these managerial precepts undermined the ethos and mission of the schools. The rhetoric of decentralisation and "parents as customers" were used only to the extent that it could be manipulated to achieve the goals of those

in power. This ambivalence created resistance, as parents' rights were given in one hand only to be taken away by the other. Accountability was perceived as a means to control teachers' labour while precluding management accountability.

The setting of clear goals forms the basis for both corporatism and religion. However, the means to achieve them differ. In a restructuring drive which aimed to shift the schools towards a narrow interpretation of the Jewish religion, there was no need for the managerial notion of captivating the "hearts and minds" of stakeholders. Religious leaders are inherently autocrats who expect obedient and disciplined believers. Adherence was predicated on the Jewish concept of *na'aseh v'nishma* (first we will do and then we will listen), which means that imposed change is in synergy with the fundamentals of the Jewish religion, whereby visible external changes in behaviour indicate the intention to commit to further learning and religiosity. Yet this unquestioning obedience is based on mutual agreement, on belief system and on the relationships of trust and care. Those cannot be imposed. Once trust was absent, resistance was bound to happen, as the vignette of the middle school policy clearly demonstrated. The narrative suggests that it is the lack of coherence between the rhetoric of new managerialism and the practice of old managerialism, which created the counterforce to the restructuring of the Jewish community schools.

Chapter 7
Coercion, consent and contradictions

The stakeholders of the Jewish community schools in Johannesburg experienced the restructuring of the schools as top-down, coercive and incoherent. The process was perceived to be too ambitious and too rushed to ensure substantive and sustainable change. Some financial relief was achieved, but at great human and educational cost. Teachers' and parents' initial consent to the restructuring, which was based on a reasonable sense of agreement owing to the financial crisis, was mostly withdrawn. Subsequently, the management resorted to crude coercion and manipulation. This mode of the change process transformed the community into a "community of suspicious minds" (Hargreaves, 2003). Community members' reputations, achievements and worth were put to shame while the rest of the community looked away, trying to *'keep themselves as clean as possible and not get involved'*.[1] This created division, polarisation and conflict – all ingredients of a low-trust community. As my inquiry tracked the first two years of the restructuring, I recorded the feelings of fear, confusion, blame, guilt, resignation, depression and general negativity that existed in the school community. Yet it was evident that compliance was achieved not only by threats and bullying but also by consent and support. As I explored what I perceived to be an irrational process devoid of integrity, and as I recorded respondents' attempts to reconcile and submit to it, I kept on wondering: How could such control over the community be exerted and sustained?

When I concluded the fieldwork for this research, after the Board conference in March 2003, the general perception was that the CEO was in total control. The newly elected honorary officers were chosen by him to replace the formerly defiant Board members. Nevertheless, a few months later the CEO was suspended after parents managed to organise themselves and demand action.[2] However, in spite of the fact that the CEO's control transpired to be short-lived, the episode became a focal point for understanding the relationship between the global and the local, and how global processes articulated with a whole range of local factors associated with the history and characteristics of the community and its educational system, as well as with local and institutional social/political/economic conditions.

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[1] Teacher voice. Journal entry, 25 September 2001. [Document 55:73 (9224:9231). Codes: Teachers - adapting to change].

[2] While there could have been other forces at play, this was beyond the scope of my research.

The aim of this chapter is therefore to explicate these global, local and institutional factors that both enabled and constrained the restructuring process and sustained the control over the community. Some aspects were already mentioned in the previous chapters, such as the lack of quality lay leadership, the reasons for the lack of organised parents' resistance, the hegemony of the managerial discourse, etc. These determining factors will be revisited in this chapter in order to explain and theorise the restructuring of the Johannesburg Jewish community schools.

Global factors

It is clear that globalisation has impacted in a variety of ways on the restructuring process. Indeed, the Jewish community schools became the arena wherein two processes associated with globalisation played themselves out: the one force pulled the schools towards market solutions and managerialism, while the other force intensified the surge for identity and community. Both forces offered stakeholders rules and parameters to combat uncertainty, failure and confusion. The evidence strongly indicates that the dominant position of corporate principles and religious extremism had shaped the worldviews of many stakeholders. The managerial discourse provided the initial allure of the process by demonstrating the failure of bureau-professionalism, setting fixed boundaries and clear targets, promoting the delivery of more efficient services mimicking business practices, and offering information technology as value-added to education thereby appealing to parents' competitive impulse in a knowledge society. The hegemonic position of managerial discourses restricted the parameters within which the solutions for the financial and administrative crises were sought. However, the democratising aspect of the managerial discourse, such as its claim for diversity and responsiveness to parents' demands, was counteracted by the parallel force of the community. At the same time the surge for community was also conflictual as it was expressed by the intensification of a particular interpretation of Jewish identity that undermined the community. My inquiry demonstrates that as the managerial rhetoric failed to deliver on its promises, the restructuring tended to increasingly rely on religious discourses. Problems with implementation were therefore not solved by appealing to managerialism and its attendant corporate culturalism but rather by resorting to religious concepts such as repentance, the avoidance of slander or "evil tongue" (*lashon ha'ra*), obedience, respect for authority and the threat that *sin'at chinam*

(groundless hatred) would result in the destruction of the community; this despite the fact that the one-off attempt to gain the support of the stakeholders by corporate culturalism – as was the case with the *bosberaad* – proved to be relatively successful. In fact, as the evidence demonstrated, there was a strong sense among stakeholders that corporate culturalism was the "right" way for organisational recovery. This was expressed in recurring demands to demonstrate consultation and to "bring people in" even without real participation. The teacher's voice quoted below describes the longing to be "captured in the discourse". It confirms that even those who resisted the mode of change in the Jewish community schools were seeking solutions for the failed managerial process within the managerial discourse. Accommodation, nevertheless, was made to the religious impulse:

> Well, I think the first thing would be to get in a total outside motivational company that is going to come in and look at everything. OK, not just financially, not just educationally, even the dynamics of the staff, you know. Some groups haven't changed within themselves for 20 years. There must be something there that is wrong. I know I see a very good advert on TV about how they can compare animals in the wild to staff members. You need to have something like that that will actually work through the staff from top to bottom … take us to a place for a *Shabbaton* (weekend) and include in that OK a *Shabbat* if that is what they want, to make it religious, I don't believe that it has to be a *Shabbat* but that's my own personal feeling. But take us away somewhere where you are away from the school environment and you can actually work through it ... .[3]

The question is to what extent globalisation was mediated by local circumstances. The evidence suggests selective accommodation of global processes. It is apparent that only global influences that coincided with local power relations were adopted. Thus, the Ultra Orthodox (global) religious groups and their views of Jewish identity were accepted, while the "politics of difference" – as articulated by the Israeli Task Force and by modern Orthodox rabbis such as Jonathan Sacks (2003) – was rejected. The global discourse of decentralisation was supported by the national context and by the democratic rhetoric in South Africa, yet it was rejected by the religious and financial powers in the community. My investigation therefore supports the view that:

> … there is no essential determinacy to the ways in which globalisation processes work, since for various globalisation pressures there are also sites of resistance and counter movements (Taylor et al, 1997:72).

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[3] Manager, 17 July 2002. [Document 35:73 (1357:1392). Codes: KD - need to be improved].

National factors

The backdrop to the restructuring of the Jewish community schools was the broader restructuring of the South African educational system, which carried remarkably similar managerial discourses such as strong management, efficiency, decentralisation, outcomes, accountability, corporate governance, parents' rights, etc. The national education system after the transition to democracy became an arena for policy development and policy reviews under a stringent macroeconomic regime, which prized performativity (Jansen, 2001a). This echoed the global trend for marketisation and managerialism. At the same time, the transition from an apartheid to a post-apartheid national education system generated many uncertainties regarding the status and place of independent schools, which have been increasingly exposed to legislation on three fronts: education, labour and taxation (Hofmeyr & Lee, 2003). In the aftermath of September 11 there were discussions as to whether faith-based schools could spread tolerance and understanding of others' beliefs (Jansen, 2002; Chidester, 2002).[4] Moreover, as South Africa embraced national identity, it had discouraged the promotion of other national identities, such as Zionism. Instead, it promoted multiculturalism and religion. The schools had to adjust to a different mindset and to numerous new policies, such as: outcomes-based education (OBE); the new Further Education and Training (FET) band for grades 10–12; the introduction of exit examinations from the General Education and Training (GET) band at Grade 9; the reduction of matric subjects from 124 to 35 – whereby both Hebrew and Jewish Studies would no longer be offered as matriculation subjects;[5] and, above all, the introduction of religion education instead of religious education – whereby the right of a school to practice religion was perceived as undemocratic and a form of exclusion. This policy eventually applied only to public schools.[6] The impact of the avalanche of these policies and others and the confusion that they generated, together with the internal restructuring, was succinctly expressed by one manger who commented that *'we are running around like chickens without heads'*.[7]

It is beyond the scope of this research to do justice to the complexities of the South African national context. There is no doubt, however, that the transition from apartheid to democracy impacted on the experiences of all education communities.

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[4] Holier than thou. *The Teacher*, January 2002.
[5] Learners may be limited in choice of subjects. *The Star*, 2 October 2002.
[6] National Policy on Religion and Education. http://www.gov.za/reports/2003/religion.pdf.
[7] Journal entry. [Document 55:332 (387:394). Codes: Curriculum 2005, OBE].

The uncertainties that were produced by such changing social, political and education contexts left the Jewish community with feelings of isolation, disengagement and powerlessness. This was coupled with the uncertainties produced by the institutional, local and global pressures, including the leadership and financial crises at the schools, the demographic changes in the Jewish community in South Africa, the political conflicts in Israel and the increased worldwide incidence of anti-Semitism (described in Chapter 3). All these heightened the tensions and anxiety in the community and generated a yearning for stability and security. Nevertheless, it is clear that the manner in which the community reacted to these tensions was shaped by its history and unique character, as well as by the power relations in the community.

Local factors

While global and national influences were clearly implicated in the analysis of the restructuring of the Jewish community schools, most stakeholders understood and experienced the process at local or institutional levels. The following sections identify different aspects of the local/institutional context that shaped the implementation process, and determined the response to national and global pressures. Among the enabling factors were the financial recovery and the feeling that the schools were saved from closure by the managerial restructuring in contrast to the perceived failure of the previous regime; the micropolitics of schools which allowed some factions within the school community to benefit from the change process; the community response to charismatic leadership; the hegemonic position of the managerial discourse; the fears and insecurities of the community in times of political and social instability; the endemic lack of debate; and the absence of a sustainable and organised counterforce. But above all, the restructuring was supported by a power bloc that included financial and religious forces in the community.

The financial recovery

The financial turnaround was undeniably a major factor that generated strong support for the restructuring from a community that, owing to the political, social and economic transformation in South Africa, had to rely on it own resources to support its education system:

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> The loss had been up to R40 million; now they are down to R30 million; and now they are in surplus. … They are running in surplus without government money. Only because of him.[8]
>
> … in terms of the funding of the organisation, he's done a remarkable job in the space of one year. That's not to say it hasn't been without pain, and that's not to say that there are no problems which have arisen because of it. But money is finite, unfortunately, and that was the problem he had to work with.[9]
>
> [The CEO deserves the credit] for restoring the King David system's viability and making significant inroads into its debt-burden.[10]

The financial recovery also explained the support for, or at least the lack of resistance to, the CEO from the honorary officers of the Board who realised that they *'were legally, fiducially, responsible for the financial liability and [they] were running an insolvent company and could be held liable for that for not taking the action that directors ought to take when you run an insolvent company'*.[11]

Once the CEO was able to address the financial problem, the Board members felt indebted to him. According to an honorary officer that support was coupled with a certain amount of dependency:

> The Board members were just too pleased to have someone who they think can rescue it and they will overlook a whole lot of other things or not question things. They don't want to offend him or the management committee (Manco) because they need him. They are too scared he will walk away and everything will be undone or that it won't be completed … I think it is a bit of indebtedness and gratitude rather than active support. There are some people who are just fans … rather than supporters. It is not that I think they really understand the issues … I think they don't like controversy, they don't like debate, they don't want things to be said that will upset him or will alienate the [Manco]; they want to show their appreciation for the work being done and the success achieved on the financial side and they want to present a united front … .[12]

The perceived failure of the previous regime

The CEO pointed to many aspects that were undeniably wrong with the system (see Chapter 3), thereby achieving consent to the proposed changes. Raising this point, Apple (2001:9) observes that the reason some people listen carefully to rightist criticism is because there are problems in the educational institutions. Criticising the CEO's tactics did not mean that there were no problems to be solved; however,

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[8] Community leader, 18 July 2002. [Document 23:15 (294:302). Codes: CEO - financial success].
[9] Lay leader, 13 August 2002. [Document 45:6 (188:201). Codes: CEO - financial success].
[10] Zulberg deserves praise. *SA Jewish Report*, 15–22 August 2003.
[11] Honorary officer, 16 July 2002. [Document 26:12 (248:320). Codes: Lay leaders - accountability].
[12] Honorary officer, 16 July 2002. [Document 26:33 (628:681). Codes: Lay leaders - CEO relationship].

acknowledging the problems did not mean that the solutions offered by the CEO were the correct ones.

The dominance of the managerial discourse

Many parents, honorary officers and donors had a background in management and accountancy. They were familiar with this managerial discourse and supported it, while they might have been less aware of the ideological transformation or the educational implications. As indicated in Chapter 5 the hegemonic position of the managerial discourse and the elevation of business concepts and corporate culture, blinded stakeholders to its negative impact on educational systems. Stakeholders therefore continued to support the restructuring, as there was "no other alternative" to the managerial solution.

The micropolitics of schools

As mentioned in Chapter 2, change put some people in the limelight and others in the shadows (Bascia & Hargreaves, 2000). The suggestion that there was no alternative may also be described as the desire by certain powerful people to ensure that certain things would happen because of the benefits such polices generated for them. It is evident that a number of stakeholders within the system agreed with the restructuring process, either for ideological reason, such as the Ultra Orthodox members of staff, or for political reasons, such as those members of staff who had been promoted or had become more powerful. They were therefore willing to support the restructuring and to turn a blind eye to its downside. The restructuring was therefore set within the micro-political history of the schools. Ball maintains that:

> Change in school is rarely politically neutral. Interests are enhanced or threatened by change. Conflict and change are inevitably interlocked as any redistribution of power and privilege will be sought by some and resisted by others. Furthermore, change does not usually arise within a set of social relations, which have been previously untouched by competition or dissention. Advocates and opponents typically 'dig in' along established lines of ideological dispute (Ball, 1987:78).

The restructuring of the Jewish community schools promoted an unequal distribution of power by privileging managers who conformed to the CEO's requirements over any stubborn managers who failed to comply. One compliant manager, for example, was able to ensure employment for two members of her family, while at the same

time other teachers were being retrenched. The Jewish Studies teachers were given a more privileged position and power, while Hebrew teachers were sidelined.

As has been mentioned in Chapter 2, during periods of restructuring there is an increase in both manipulation and micro-political activity in schools (Ozga, 2000). These on-going micro-political struggles intensified the polarisation in the school community – an "us and them" relationship developed between the managers and the teachers; between those who fell under the charisma of the CEO and those who fell out of favour:

> Teachers speak about kings (principals and deputies) and peasants (the rest). [The principal] doesn't mention any vice-principals – like they are not important anymore.[13]

It is evident that while some middle management – such as heads of departments and vice-principals – retreated into their classrooms, a new middle management had emerged. One teacher described how she tried to forge a new role for herself and the status she felt she deserved after she was sidelined by the previous management:

> I went to speak to [the CEO] – I asked him: 'Where am I going?' straight. And I said: 'Is there a place for me?' … What has happened in the past – there were so many vice-principals. Now it's a case of reshuffling, getting rid of people as they are retrenched or retired or whatever the case may be. … But I think whereas in the past the frustration was that somehow the teachers were doing more than anybody else – what's happened now is that everybody's got a heavy teaching load. It doesn't matter what your title is. So that's kind of balanced it a bit – but not salary-wise. I now sit in on the executive meeting. I am treated exactly like they are, but without the title.[14]

A power shift also took place among the lay leaders, whereby the vice-chairperson – who surrounded herself with outside corporate and business advisors – and the chairperson – who was perceived to have played a lesser role – as well as a few other executives were working with the CEO to control the school community. Other members of the Board were either ignored or were used as a sounding board for decisions made by the CEO. It was perceived that while the previous people at the Board were blamed implicitly for what had gone wrong, *'the new guard claimed credit for saving things'*.[15]

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[13] Journal entry, 8 December 2001. [Document 55:136 (8253:8260). Codes: Teachers - relationship with colleagues].

[14] Teacher, 24 October 2002. [Document 49:3 (95:167). Codes: Middle management - loss of position].

[15] Honorary officer, 16 July 2002. [Document 26:12 (248:320). Codes: Lay leaders - accountability].

The effect of charisma

While the restructuring of the Jewish community schools drew heavily on the discourses of new managerialism with its emphasis on decentralisation, efficiency, accountability and shared goals, the evidence shows that in fact it was the deep ideological views and the personality of the CEO that shaped many choices around downsizing, efficiency and retrenchment. While not opting for individual analysis, I concur with Bottery (2000:26) that the personalities of those in power are a powerful mediating factor in determining how a general policy stance would be approached and implemented. The CEO was able to understand the managerial and ideological concepts and solutions and to play into the gaps created by the discourses. The most significant attribute of the CEO was his uncanny ability to captivate his audience. Stakeholders described it as manipulation through charisma:

> When he talks – he manipulates. Half the stuff that you hear him talking, I would like to turn around to the parents and say: 'That's a lie. And that's the next lie, and that's the next lie' … he has an incredible way of telling a joke – winning you on his side – and telling you the good things financially … .[16]

> There's charisma that he can stand up and he can persuade an audience tremendously, okay. But it's a different element of charisma. A politician has that. There can be total insincerity, but you can get up in front of people and sway the crowds. He can do that – no question. … You know he sometimes reminds me of … leaders of sects. They have a way of controlling people … that they are almost brainwashed.[17]

> If you look at the people who are working there at the Board, how they actually idolise him. He is like a king and all the people who are working for him are his puppets. You dare not, you dare not criticise one little thing; you dare not.[18]

> He speaks very nicely. He knows what to say so people will get excited about it.[19]

> If you listen to Eugene Terreblache, you will believe in the policies of his party as well. I mean, [the CEO] is a good orator. My husband sums it up – he's a con man.[20]

> He's a wonderful orator, so he can tell you anything, and you will believe it … When you go to have a meeting with him … he can talk for two hours and you won't say one word – you won't open your mouth. And you walk out of there, and you've been totally brainwashed or you are totally frustrated.[21]

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[16] Manager, 16 October 2002. [Document 21:51 (880:895). Codes: CEO - captivating stakeholders].
[17] Parent, 31 January 2003. [Document 63:57 (1544:1578). Codes: CEO - captivating stakeholders].
[18] Manager, 26 May 2002. [Document 11:127 (688:696). Codes: CEO - captivating stakeholders].
[19] Community leader, 24 April 2002. [Document 15:33 (350:358). Codes: CEO - captivating stakeholders].
[20] Parent, 14 August 2002. [Document 40:21 (371:375). Codes: CEO - captivating stakeholders].
[21] Parent, 15 November 2002. [Document 44:70 (1456:1490). Codes: CEO - captivating stakeholders].

The next quotation is instructive as it shows the effect of charisma on a manager who seemed to agree with the CEO's suggestions, even though her past experience told her otherwise:

> The CEO doesn't want special Jewish Studies or Hebrew teachers in the nursery schools, which I agree with. But at the same time it is very hard for a teacher who has no feeling, who has no background, to start teaching about Jewish concepts … I don't know if it is financial – he just feels that the teachers need to be all encompassing. That a teacher, specifically in pre-school, and I agree with him, but there just aren't the staff available … He wants there to be a lot more *Yiddishkite* (Jewish values), a lot more values; that when people walk past each other they greet each other, that we respect each other, that we treat the black staff with respect. [*CH: Does he set an example of that?*] Well you see, he is the opposite, but then I don't use him as an example; I use the theory – the philosophy is a good one.[22]

Charisma is an important component in religious outreach communities (Harris, 1999); it has also been an attribute of many CEOs in the corporate world, even though their "superstardom" has been in decline in recent years, as there is a growing realisation that charismatic leaders are *'good for the bosses, but bad for companies'*.[23] Charisma is also an effective local force. As mentioned in Chapter 3, the South African Jewish community had traditionally reacted well to charismatic leadership: first, because its national-ethnic identity was perceived to be based on spontaneous sentiment rather than on deep involvement in learning or intellectual argumentation; and second, because the community, with its roots in the apartheid regime, was trained to respond to a totalitarian authority structure (Kaplan, 1998a). It is therefore feasible that some members of the community reacted to the CEO as the new charismatic leader, both in terms of ideology and economics, and as someone who would rescue the community and provide it with the order it so desired.

House (1988), who studied the politics of charisma, maintains that there are advantages and disadvantages to charismatic leadership. The strength of charismatic leaders is that they can order followers to do things simply because they say so, and this control gives them greater flexibility in charting policy direction. They can advocate one policy one day and another the next, with minimal cost to their authority. Many stakeholders experienced this aspect of charisma as they watched the

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[22] Manager, 25 June 2002. [Document 17:8 (209:231). Codes: Stakeholders - supporting the CEO - contradictory discourse].
[23] The curse of charisma. *Economist*, 364(6289), 9 July 2002.

CEO initiating policies, and then changing them or retracting them without *'thinking that he's lost face'*.[24]

Charisma also has serious limitations. First, the extent of charisma – not everyone will find a particular person to be charismatic. Second, people who incite strong positive emotions in some people also incite extremely negative emotions in others, which means that charismatic leaders can expect an intense backlash. Third, there is a potential lack of accountability because it is difficult to call a charismatic leader to account for his/her absolute certainty. Fourth, charismatic leaders have a certain amount of endemic disorganisation. This style of administration, however, seems to be deliberate rather than an oversight; by setting up rivalries and confusion among their subordinates, charismatic leaders seek to ensure control and force others to be dependent on them. House (ibid) therefore argues that in the educational context charisma by itself is not enough to restructure or transform school systems. It can mobilise, but it cannot organise. In order to sustain charisma it is important to have supportive structures, which the CEO was trying to build by brining in, and promoting, those who complied with his demands. As mentioned before, charismatic leaders unintentionally do more harm than good because they usually provide episodic improvement followed by frustrated or despondent dependency (Meyer, 2003; Fullan, 2001).

The stakeholders of the Jewish community schools experienced all these features. The CEO's charisma caused divisions and polarisation; while some respondents glorified him, others demonised him. The evidence suggests that dependency was also produced. And indeed when the CEO left the organisation, he left a vacuum that the stakeholders seemed to fill by reinventing the past or by reinforcing authoritarianism. (This could be a topic for further research.)

Lack of organised resistance

Support was not only achieved by consent but also by the absence of organised opposition and a viable alternative. The evidence points to the difficulty of the parents to organise themselves as a cohesive group. This confirms Noddings's (1996) claim that a community cannot be created merely on the basis of a rejection of another ideology. A community needs to have a definite core that would hold its members

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[24] Manager, 8 October 2002. [Document 34:6 (168:182). Codes: CEO - reversing decisions].

together. The parents were relatively successful in creating committees, but they were not able to overcome the diverse interests that they represented or to establish a community with a leader strong enough to lead it. While this did happen temporarily at Victory Park when the community bonded together to save the campus from closure, there was not enough impetus to initiate a similar process to take over the management of the schools.

The Board members, who had the constitutional rights to dismiss the CEO or at least to demand to see his contract, were also not unified and there was *'a lot of political play going on ... and "divide and rule"'*.[25] Even those who resisted the CEO were not working together as they represented different political and ideological stands. A defiant member of the Board was therefore reluctant to ally himself with another member who was pushing a liberal agenda. Interestingly, it was against the latter that most members of the Board were eventually reunited to support the CEO at the Board conference, and to object to any constitutional change that might take power away from the Board and devolve it to the schools:

> Let's say there was a contentious issue … we got an onslaught from Victory Park to say they want to open the schools to all races ... It's very simple to call an extraordinary Board meeting, and get all those old people … and say, 'Come on guys – listen, let's put our heads together. We are not going to open King David to the blacks – we are going to keep it solely Jewish, and whoever's now asking for that, let's stand as a united force'. So although … [the Board] is a lopsided body, it's a useful lopsided body.[26]

Lack of resistance was also identified in the broader community with the dearth of community leaders with high status to interfere in the process of the restructuring of the Jewish community schools:

> If you'd asked me that 20 years ago – if something like this had occurred … there would have been personalities within the community, even if they weren't sitting on the Board, who were strong enough as leaders of the community. I don't believe that that exists today at all. "At all" might be a bit harsh. There are people for whom those issues are important enough … .[27]

As already mentioned in Chapter 3, the leadership of the Jewish community in Johannesburg in the 1990s was mostly affiliated to the Orthodox establishment with Ultra Orthodox undertones. The Reform movement was depleting both in terms of

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[25] Manager, 16 October 2002. [Document 21:44 (764:817). Codes: Lay leaders - CEO relationship].

[26] Lay leader, 20 August 2002. [Document 41:7 (173:238). Codes: Lay leaders - life members].

[27] Other stakeholder, 15 July 2002. [Document 25:54 (1221:1230). Codes: Jewish community leaders - forsake schools; Resistance].

numbers and leadership. Organisational representation of secular Zionism was almost non-existent. Many intellectuals and liberal thinkers had left the country during the apartheid era; others tended to be excluded from any communal establishment, regardless of their political or religious ideology:

> Even if you try and get into those Jewish communal institutions as an Orthodox right-wing Zionist man who's not a businessman, you won't get past a particular stage ... Maybe they will tolerate a lawyer or two. But I mean, if you are an academic or, heaven forbid … a manual worker, or an artist, or I think even a medical doctor, then don't interfere in what the big people are doing … because they know better.[28]

There was no counterforce, therefore, to oppose the Orthodoxy's takeover of the community and the schools:

> In a conference that we had in Israel last year with all the rabbis, the rabbis were told that there are no leaders in the community. There is a gap. And if the rabbis will not fill the gap the community will have no leadership.[29]

It was also perceived that the liberal, secular or non-observant Orthodox Jews who were left in the community had little Jewish knowledge to understand or debate Orthodox and Ultra Orthodox ideologies that were being presented as the authentic type of Judaism. These ideologies had therefore begun to forge the "common sense" of the community and the schools:

> The lay leadership in the main doesn't have the Jewish knowledge to understand what you and me are talking about. They don't see the broader heritage of Judaism, they see [the Ultra Orthodox] people as authentic, and frankly don't have the courage or the intellectual awareness to do anything about it. And so sadly you get the school reflecting the community and the community reflecting its right-wing tendencies and more and more going into the ghetto in Johannesburg and wherever they are ... .[30]

The few community leaders who opposed the restructuring of the schools and their shift to the "right" complained softly so as not to "destabilise the community" and perhaps their precarious positions within it. It therefore appears that the narrative of the "homogenous community" had contributed to silencing the opposition to the restructuring and to facilitate a further shift to the "right".

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[28] Parent, 8 November 2002. [Document 32:25 (838:888). Codes: Jewish community - leadership].

[29] Community leader, 24 April 2002. [Document 15:15 (202:225). Codes: Jewish community - leadership].

[30] Community leader, 3 June 2003. [Document 73:6 (255:262). Codes: Jewish community - leadership].

Uncertainties and fear

As emphasised throughout this dissertation, the restructuring was motivated by "manufactured uncertainties" as well as by a multitude of varied fears: fear of losing livelihood or position; fear of not having a suitable school at which to educate the community's children; fear of assimilation and intermarriage; fear of left liberals who wanted to open the schools to gentile pupils; fear of anti-Semitism and especially the insecurities produced by living in a pro-Palestinian state; and fear of being without the CEO. All these fears had kept resistance at bay and had generated a sense of compliance to the process. One should not underestimate these fears:

> There is anti-Semitism today at a level that I wouldn't have believed was possible. I thought it was history, that it would never happen again, not in my lifetime. It was something my parents knew. There was the Holocaust. About two-and-a-half years ago [I thought that the] Jews are affluent, they are generally doing well [and that] there is no explicit anti-Semitism … and it has completely turned around. So today, I am experiencing 1938 here, and I was in Durban. I have never recovered from that … I was terrified. I wasn't terrified physically, but I was horrified at what I saw. And it has just gotten worse from then … .[31]

Yet these fears were spread and exploited. In the CEO's speeches and letters, the enemies were always present. This is exemplified even in a reply letter to the pupils of Victory Park who complained about being excluded from a tour to Israel. The CEO wrote, *inter alia*:

> When one is excluded, or does not get one's way, it is not an excuse to try and jeopardise others … I do believe that unity is strength. In these difficult times we have enough enemies challenging our existence … .[32]

The fears of the left liberals and Reform Jews were related to the attempt to decentralise the Board. It seems therefore that while most respondents were attracted to new managerialism and to the jargon of accountability, efficiency and shared goals, the notion of decentralisation contradicts the local emphasis of community unity and the values (as well as the power) that its leaders would have liked to preserve:

> But we have a very big threat from the left wing. The left wing wants to open up, wants to split the Board up and let the schools run themselves … They want to have a separate board, to divest the assets of the Board to the schools, which they can't do because it's a community school. Who's going to do subsidies? There is a whole major issue of left wing Reform guys who want to bring in constitutional changes and this is a major problem. And as the Chief Rabbi said in our last meeting, he said that if this comes through it comes through as a death knell ... .[33]

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[31] Other stakeholder, 6 March 2003. [Document 67:22 (536:559). Codes: Fear of anti-Semitism].
[32] Letter to the Editor. *SA Jewish Report*, 2–9 November 2001.
[33] Honorary officer, 7 March 2003. [Document 65:27 (857:873). Codes: Fear of left radical].

Lack of open debate

Throughout the restructuring there was a deliberate attempt to obscure any information and to curtail any open debate about the tensions and conflicts at the schools. One example was the refusal to allow the Israeli Task Force report to be distributed to parents and teachers. Another example was the attempt to restrict the topics to be discussed at PTA meetings or the distribution of these meetings' minutes. The CEO usually refused to take any questions after his presentations to parents.

There is evidence to suggest that there was also a restriction on what was published in the community's weekly newspaper – the *SA Jewish Report*. There was one attempt to publish an article that explored the diverse opinions within the KD community.[34] The article did not produce debate, but rather rage among certain community leaders who were perceived to discourage the future publication of similar articles. It is therefore argued that freedom of speech has not been promoted in the Jewish community; not only on the topic of education but also on other political topics which might be in disagreement with the "community's view".[35]

Furthermore, as mentioned in Chapter 3, this lack of debate seemed to be endemic to the community at large. It is perceived that critical articles usually generate defensiveness and blame but no constructive engagement with their content.

> It is very hard in this community to stimulate open debate about anything, anything at all. If the newspaper publishes stuff on Israel – left, right, centre, whatever it is – very seldom would it get a genuine engagement with the issues. What will come will be a message from all sorts of directions: Why does the newspaper publish such provocative stuff? So there is a general atmosphere here – and I think to some extent it has always existed in this community – of an inability or unwillingness to have a good debate about anything, not just education. There is intolerance for debate. It has become worse over the years. It was bad enough during apartheid, and there you could sort of understand some of the reasons more logically … . There is also the kind of personalities who run the community, from the Board of Deputies side and the Board of Education side or the newspaper board, they don't actually encourage debate. The leadership does not encourage debate. Traditionally, the leadership of this community is very authoritarian … .[36]

While every newspaper operates within boundaries, the *SA Jewish Report* operates within narrow political and religious boundaries, thereby shaping and being shaped by the narrative of the "homogenous community", as well as by the power bloc that controls the consensus.

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[34] Diverse views: parents, educators, administrators. *SA Jewish Report*, 1–8 March 2002.
[35] Parent, 8 August 2002. [Document 32:22 (711:761). Codes: SA Jewish Report].
[36] Other stakeholder, 6 March 2003. [Document 67:1 (27:59). Codes: Jewish community - lack of knowledge/debate; SA Jewish Report].

Power bloc[37]

The restructuring of the KD schools was supported by a power block in the broader community which comprised three main forces: the Chief Rabbi and the Orthodox establishment; the business and the financial elite of the community, and the growing Ultra Orthodox community which interlinked with the other two forces. This power bloc, which supported the employment of the CEO, kept rescuing him whenever his policies were resisted. The aim of the next section is therefore to identify and describe the various members of this alliance and to explore how stakeholders understood and experienced the power bloc's continual support for the restructuring.

The Chief Rabbi and the Orthodox establishment

The Chief Rabbi is the honorary president of the Board, even though historically he hardly ever attended Board meetings or became involved in the management of the schools. His participation was usually confined to the Board's conferences or special meetings. The evidence shows that he was involved with the restructuring from its inception when he endorsed the CEO's appointment. While the Chief Rabbi's role during the process was not clear to my respondents, it was perceived that he had *'a lot of influence on the CEO and … on the vice-chairperson'*.[38] As the restructuring evolved and resistance mounted, the Chief Rabbi began to take a more active role by attending selected Board meetings – sometimes to ask for reconciliation, and sometimes in order to silence opposition.

As mentioned earlier, the unconditional support that the Chief Rabbi continued to give the CEO – despite the stakeholders' attempts to alert him to the autocratic manner in which it was being implemented – frustrated many stakeholders and increased their feelings of isolation. They began to fear that there was no one to turn to:

> I remember sitting and saying to different people: 'Surely there's got to be somebody who we can speak to'. And people were saying there was no one. Someone would say: 'What about the Chief Rabbi?' And: 'The Chief Rabbi's involved in the process'. And I know if anything goes to the Chief Rabbi, the Chief Rabbi would immediately go off to [the CEO]. There's no sense of confidentiality.[39]

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[37] The notion of a power bloc, or the "rightist alliance", is borrowed from Apple (2001, 1996).
[38] Lay leader, 28 October 2002. [Document 30:29 (783:787). Codes: Chief Rabbi].
[39] Manager, 15 October 2002. [Document 39:17 (582:590). Codes: Chief Rabbi].

Stakeholders struggled to understand that support. Some respondents maintained that the Chief Rabbi was grateful that the CEO had saved the Jewish community schools from closure, while others argued that the Chief Rabbi was being conned by the CEO or that he was pushed by powerful people in the community to support the CEO. The citations below describe various attempts by the respondents to explain the perceived failure of the Chief Rabbi to protect the school community:

> The Chief Rabbi has sold himself totally out to [the CEO]. … Whether it's a – if it's a money issue and those things – it's blasphemous to say – but I don't know. If it's all the people that are the monied people in town that have bullied certain people, and therefore they won't change, because again – I think most of it revolves around this pecking order, and money, and power and those sorts of issues.[40]

> The Chief Rabbi will not resist the idea of making Jewish Education more intense; he is a Chief Rabbi after all. Knowing him I am sure that a lot of things that are happening in the Jewish community in South Africa are not to his personal taste – moving towards extremism or separatism – but on the whole if you are the Chief Rabbi you would say it is going fantastically. He would say that it is fine, that it is amazing what is going on … .[41]

> I think [that the Chief Rabbi] could very well be tied up … on a political level. I think also that he thought … 'Ah, here's the solution, and the solution must now work'. And they weren't prepared to look at the solution again and say: 'Hold on a second. Maybe it's not working … '.[42]

Other respondents tried to explain the Chief Rabbi's attitude by looking at the political situation within his community. The perception was that the Chief Rabbi, who was usually seen as being modern Orthodox, had to contend with a rabbinate that had become increasingly more extreme.[43] It was perceived that this process was not only local, but rather a global phenomenon whereby modern Orthodox rabbis – such as the Chief Rabbi of Britain, Jonathan Sacks[44] – need to look constantly "over their right shoulder" to accommodate the more extreme members of their communities and to prove to them that they are *serious Orthodox Jews, because serious Orthodox Jews go to the Yeshivot and they don't go to Cambridge University*.[45]

Other respondents maintained that the Chief Rabbi used to complain about the lack of Jewish knowledge among King David graduates who had spent 15 years at the

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[40] Manager, 16 October 2002. [Document 21:46 (803:817). Codes: Chief Rabbi].
[41] Other stakeholder, 9 December 2002. [Document 22:8 (165:181). Codes: Chief Rabbi].
[42] Manager, 15 October 2002. [Document 39:21 (622:652). Codes: Chief Rabbi].
[43] Lay leader, 28 October 2002. [Document 30:33 (830:845). Codes: Chief Rabbi].
[44] The respondent refers specifically to an incident whereby Rabbi Jonathan Sacks had to withdraw from publication and change some comments in his book (2003), *The Dignity of Difference*, in response to an Ultra Orthodox faction in his community who described the book as heresy.
[45] Parent, 8 November 2002. [Document 32:33 (1257:1293). Codes: Chief Rabbi].

schools.[46] As mentioned in Chapter 3, the Chief Rabbi was quite vocal in his objection to the schools' emphasis on marks and achievements, while, in his opinion, less emphasis was given to Jewish values and Jewish morality at a time when these were most needed in order to cope with the uncertainties of a changing world. While the Chief Rabbi and the modern Orthodox establishment might oppose hard indoctrination – such as that used by *Ba'al Teshuva* movement – authoritarianism is not uncommon in religious communities wherein diversity needs to be controlled and relativism is not accepted. The Orthodox establishment would therefore support the right of the schools to fix their level of religiosity as a blueprint, and to guide pupils and parents in that direction.[47] It would not be a matter of the majority of parents deciding what they wanted the school to be; where religion is concerned, democracy is a relative concept. While the religion–democracy debate was not a new tension among Board members (as was discussed in Chapter 3) it is feasible that having a strong CEO as the head of the organisation who could control the opposition, eventually gave the Orthodox establishment the upper hand in a debate that had begun in 1928. The managerial change therefore became a tool to resolve the religion–democracy conflict:

> [The CEO's] feelings … are that we are not a democratic institution. We are a Jewish day school with a Board, which is elected, and that Board makes decisions. Parents should know what the school is all about before they send their children there. And just like you read an organisation's constitution before you decide to join … you decide whether this is a good school or a bad school to send your kids to. We don't ask the community to decide what kind of school. It's not a democratic school in the sense that every Jewish parent has a stake holding … The Board does not ask the stakeholders, who are the people who pay for the education, what they would like it to do. If you had to propose to the parents of the school to take a vote on whether or not to accept non-Jewish children at the school … I think that decision might be different to the decision taken by the Board. So it's not totally a client-orientated kind of school.[48]

Moreover, with the help of the CEO the Orthodox establishment won the "broadly national–traditional" dispute and managed to have it changed to "Orthodox Zionist", thereby clearly redefining the borders of the community. The means to achieve that end were deceitful, even though one respondent was unsure as to who deceived whom:

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[46] Other stakeholder, 20 December 2001. [Document 62:11 (516:524). Codes: Chief Rabbi].

[47] Community leader, 28 January 2003. [Document 60:16 (433:437). Codes: KD - reason for attending the schools].

[48] Other stakeholder, 8 November 2002. [Document 50:5 (207:310). Codes: Process - creating a vision].

> [The CEO] came and asked the rabbis to support him at the [Board] conference. [The Chief Rabbi was also there.] The rabbis were very enthusiastic about it. Rabbi… said to them to be careful and not to fall into a trap, [the CEO] has got his own agenda and it has nothing to do with religion … .[49]

The rabbis, nevertheless, also had their own agenda. For them the coercive CEO was instrumental in resolving the Orthodox-Reform Judaism conflict. In a letter to all the *shuls*, the chairman of the Rabbinical Association advised them that each *shul* was entitled to have one to six delegates to vote at the conference. He therefore appealed to them to send their full complement of delegates and to ensure that the voters would choose only delegates that belonged to Orthodox *shuls*. The CEO helped by registering over 40 new affiliates to the Board two weeks before the election at the conference, even though legally they did not comply with all the demands for affiliation. The obedient new delegates had clear instructions what to vote for and why:

> Well, besides the fact that most of our congregants, at least in the mainstream *shuls*, have children at King David and as rabbis, we should be taking an interest and making a contribution towards enhancing their *chinuch* (education), this conference is particularly important. There are some very vocal and well-connected members of the Reform temples who are making a concerted effort to get elected to the Board at this conference. They have a very specific agenda, which will *chas v'sholom* (God forbid) set back the cause of *Torah*. You can help in a simple but significant way ... .[50]

And indeed, a few minutes before the election for the executive committee, the hall filled up with many Ultra Orthodox and Orthodox rabbis who voted-in the constitutional changes and elected the new Board members, as described in the Prologue.

In sum, it seems the Orthodox establishment, represented by the Chief Rabbi as an active player in the restructuring, had a few reasons to support the process, namely: the perceived failure of the schools to instil their notion of Jewish values; their wish to define the schools as Orthodox schools and to guard them from any changes that the South African transformation to democracy might bring into the community; and to win a long-standing battle with Reform Judaism and secular Zionism regarding the ideological base of the schools. The paradox is that they could have won it with a simple show of hands. By defining the borders of the community the Orthodox establishment was able to choose the parameters within which Jewish

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[49] Community Leader, 9 April 2003. [Document 74:2 (88:117). Codes: Chief Rabbi].
[50] An urgent message to all *Chaverim* (friends) from Rabbi Yossi Goldman, Chairman of the SA Rabbinical Association, undated.

education would be provided, thereby aspiring for the creation of a defined, unified and exclusive community.

This brings to mind Professor Adar's comment when he observed the schools in 1965:[51]

> I cannot rid myself of the unfortunate impression that public figures from different groups tend to project all their political and ideological arguments on to the field of education, to the extent that any educational discussion turns into a reflection of the various party trends within the small Jewish community (Adar, 1965:20 translated from the Hebrew).

The business and the financial elite

I include in this category the donors, businesses or banks that had historically supported the schools and could have influenced the process. While reliable information was not available, there is evidence to suggest that donations did begin to come in as soon as the restructuring process took place. Moreover, there was certainly some direct support as banks donated money or expertise to ensure the success of certain policies, such as the graduation ceremony and the CEO–staff relationship (e.g. the *bosberaad*).

A few explanations were forwarded to explain this support. First, as already mentioned in Chapter 3, donors became frustrated as the schools were constantly in debt despite the financial assistance. They were perceived to be interested in having a *'tight rein on finance'*.[52] Once they had found the solution they gave it their full support whatever the consequences:

> [The chairman of the bank] tends to support [his] own protégé … He comes from a point of view of financial survival or financial disappearance. And from his perspective [the CEO] has done a great job … . The school still exists on a financial basis. But you see, the guys at [the bank] were only brought in from a financial survival point of view and if they say he's good, they will say he's good because he did what they wanted him to do. But … you've got to look beyond that. You've got to look at the whole heart and soul of a school.[53]

Second, it was suggested that some donors had a personal interest in sustaining a process that promoted their wives (such as in the case of the vice-chairperson or the human resources manager). It was therefore perceived that community members would not oppose the donors (or their wives) as many were dependent on these financial institutions for their livelihood:

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[51] See Chapter 3.
[52] Teacher, 4 November 2002. [Document 19:22 (465:472). Codes: Banks - support to CEO].
[53] Parent, 31 January 2003. [Document 63:33 (777:813). Codes: Banks - support to CEO]

> One idea I've got, for example, is [human resources officer] working on the Board. [Her husband] is the chairman of a [bank]. He is a big donor. Well the minute [the bank] is supporting the restructuring, most people in town are dependent on [the bank] – for some sort of area in their business. They don't want to lose it. [A financial institution] is a very big player [A director of this institution is the vice-chairperson's husband]. The minute you get enough of the big players financially involved, then other people will become scared to argue, because they will be – not only pushed out of the Board, but they become non-players in the business world, if you need those sorts of people.[54]

Third, it was perceived that businesses and corporations had to support education so as to exhibit some social morality and responsibility, as well as to ensure the economic continuity of the community:

> The bank supports the Jewish school because this is where they are getting their future actuaries and accountants who will be happy to do business with the bank. This is where the bank's money will be made in the future.[55]

Fourth, there were players among the financial elite who supported the ideological shift to the right either because they themselves had become more religious, or because of the historical association between rabbis and business people. Many successful firms in Johannesburg provide their staff with a weekly lesson given by a rabbi.

> There's a kind of mutually … reinforcing thing very often between the businessmen and the rabbis. And there's a kind of "deal" which works for both of them – which is the rabbi's get to decide on the religious stuff, and you have the businessman controlling the secular – well, not the secular – the communal stuff.[56]

Some respondents viewed this mutual relationship in a negative way, whereby the Ultra Orthodox manipulates business people by filling their *'sort of spiritual hole'*.[57] The following quotation illustrates how one respondent perceived the restructuring of the Jewish community schools as a type of alliance between the businessmen and Ultra Orthodoxy:

> These *charedim* are brilliant with the princes of this community. They aren't interested in you and me; they are interested in people with bank balances. So, they essentially feel their way into the affections of the rich, who get status and [respect] from that, and then the rich think to themselves 'My goodness, if we can solve the financial crisis at the school we don't have to give more money'. And who better than [the CEO] who did very well with his private college?[58]

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[54] Manager, 16 October 2002. [Document 21:45 (790:802). Codes: Banks - support to CEO].

[55] Parent voice. Journal entry. [Document 55:280 (66:70). Codes: Banks - support to CEO].

[56] Parent, 8 November 2002. [Document, 32:25 (838:888). Codes: Business - support to the restructuring].

[57] Lay leader, 28 October 2002. [Document 30:9 (370:515). Codes: Jewish community - receptive to religiosity].

[58] Community leader, 3 June 2003. [Document 73:3 (115:145). Codes: Jewish community - leadership].

The Ultra Orthodoxy

As mentioned in Chapter 3, many of the rabbis even in the mainstream Orthodox synagogues identified with the Ultra Orthodox communities. The rabbis were mostly perceived to be young, bright, energetic and charismatic. The perception was that:

> The left is withering away … and that the power in this community has shifted to the Ultra Orthodox Rabbinical establishment … And if you go to some of the *shiurim* (lessons) in the little *shtibls* … you will find that they are full of young people. It's not a bunch of old people sitting; they are young dynamic lawyers, doctors and architects. All sorts of people, intelligent, articulate people are joining this group. They have the money and the power. So the cream of this community is going in that direction.[59]

In spite of their relatively small numbers, the Ultra Orthodox voice is vociferous, and their worldview began to slowly occupy the common sense of many community members. The latter had very little Jewish knowledge to debate the issues brought up by the Ultra Orthodox adherents (whose Jewish knowledge is also debated by some), or were just indifferent to the religious authority not realising that the education system socialises and produces the next generation, which will reinforce this *charedi* worldview. Furthermore, secular Jews in Johannesburg did not have any other ideology to follow; they therefore tended to follow the "rightist alliance":

> If you've got a situation in which people don't feel that strongly about these things anyway, then small groups of people can control the whole thing. I think that's the reality you sit with. I mean the *charedi* – the Ultra Orthodox … they are not much more than 10% either – so there are 80% in the middle who will go along with all this stuff because they are quite ignorant and they don't want to be accused of rocking the boat by people who are the "real Jews".[60]

Modern religious fundamentalism often cloaks itself in the language and authority of traditional faith. The appeal of the Ultra Orthodox movement in South Africa, especially *Ohr Sameach*, is that they give the impression that they are the only authentic Jews who keep the narrative of the "imagined" community, that is, the *Mitnagdim*/Zionist/Orthodox/homogenous community. While the *Mitnagdim* and the Orthodox ingredients are evident, the Zionist element is not that clear. As mentioned in Chapter 3, the movement has a strong emphasis on *Torah* learning, uncompromising adherence to the *hallacha* and opposition to Zionism as a political

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[59] Other stakeholder, 6 March 2003. [Document 67:11 (213:255). Codes: Jewish community - religious background].

[60] Parent, 8 November 2002. [Document 32:23 (762:837). Codes: Jewish community - lack of knowledge/debate].

ideology. Yet, they have many learning centres in Israel, to which they send a number of followers, some of whom choose to stay in Israel in closed communities. They therefore might give the perception of being Zionists, but this is neither secular Zionism, nor religious Zionism. Their attachment is to the Land of Israel rather than to the State of Israel.

The Ultra Orthodox/Orthodox movements continue to send messages of great consensus and unity, thus sustaining the narrative of homogenous community. In this "imagined" community parents are "happy" that their children are becoming more "right-wing"[61] and the various religious movements live in harmony:

> Anywhere else in the world, if a Jewish student goes … to *Lubavitch* one night, it's very difficult for you to go to an *Ohr Sameach* the next night, or to go to *Bnei Akiva* the next night, or to go to the *Kollel*. Here, it's user friendly … nobody's going to point a finger and say, 'Oh, I saw you at *Ohr Sameach* – you've got a label, and because, for want of a better phrase, the '*Kochot shel Torah*' (the powers of the *Torah*), have come together in Johannesburg. It's healthy competition … whereas almost everywhere else in the Jewish world, the competition is unhealthy.[62]

The above citation could also indicate that those who join the religious movements do not engage with them on an intellectual or ideological level, but rather as a form of socialisation and identity, in which the charisma of the speaker is vital. The rabbis react to that by popularising their sermons:

> The rabbis don't want to bring people to Hebrew. They want to bring them to religiosity, as they interpret religiosity. … I remember the tradition of preaching where the rabbi would take up a sentence and interpret it ... It would be a proper sermon. No more – because the community doesn't want to hear it. … I can't stand sermons that bring down to the lowest common denominator. And these are the ones that are popular. So instead of bringing people up, they bring down the *Torah*. ... Even Rabbi... on *Kol Nidre* night,[63] started to give a sermon about 'Big Brother' … and he made people laugh. And I think … there are so many occasions outside of *Kol Nidre* that people could laugh. I didn't approve of people laughing in *shul*, for example, and not on *Kol Nidre*. Maybe on *Simchat Torah*.[64]

My personal experience and the evidence suggest that not everyone is happy with the turn to "right", and that there are no idyllic relationships, even within the "rightist alliance", as the following voices illustrate:

> And the young people – so many of them – have become extreme. I knew a number of people. The late Mrs…, she was a very cultured woman … . Her husband was a

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[61] Task Force report, The South African Jewish Day School System, Comments by Chief Rabbi Harris. Office of the Chief Rabbi, Johannesburg, 21 October 2002.

[62] Community leader, 28 January 2003. [Document 60:19 (577:641). Codes: Jewish community - religious background].

[63] An opening service on the Day of Atonement.

[64] A Jewish festival in which Jews dance and rejoice with the *Torah*. Other stakeholder, 20 December 2001. [Document 62:16 (1020:1045). Codes: Jewish community - religious background].

> *shochet* (a ritual slaughterer). … She brought up her children in a very *datti* (religious) home. … She told me the story with tears in her eyes: Her little grandson comes to her house once a week. He wants milk. So she says, 'Go to the fridge'. 'No', says the mother, 'that milk is not *kosher*'. And she says, 'In my house – in the house that my daughter grew up, and suddenly my grandchild cannot drink the milk from my fridge'. So you see, Mrs…'s home was an informed and knowledgeable Jewish home … there were people there who came to the house, *Rabbonim*, *chazonim*, and everybody … observant people.[65]

> On the one hand this is a town that's viewed as much more religious, so naturally you attract a lot more people. And you've got a whole different set of ways of influencing people – through the *shuls*, through the rabbis, etc. But at the same time it's a very, very competitive space. I mean, Rabbi…, who is a leading member of *Bnei Akiva*, will get a call from an [*Ohr Sameach* rabbi] once a week to try and take him away, you know. It's a very aggressive, predatory environment in that the *charedim* are just waiting to go in and take as many people out of *Bnei Akiva*, out of *Mizrachi,* as they possibly can, and out of the general system.[66]

While the rhetoric of the "homogenous community" does not seem to apply even within the "rightist alliance", it definitely fails to include the "others", such as the non-observant Orthodox Jews; the secular and the Reform Jews. In the struggle over identity in the globalised world, the recurring message from the strained religious alliance is that you either join one of these "user friendly" communities or you might lose your Jewish identity:

> We cannot sustain a middle road anymore. We must move to a more observant path or we will lose our Jewish identity. There were two directions the youth are taking simultaneously. On the one hand, there was a revolution with many youth coming back to religion, but at the same time there was a crisis because the youth were moving away, being assimilated and intermarrying.[67]

Subsequently *'the secular flexi-orthodox kind of group is marginalised in this community and it actually feels … disempowered today and disenfranchised'*,[68] even though it is perceived that the majority of the community is *'still by far … the middle of the road, traditional but generally not fully observant shul-going'* Jews.[69]

In summary, there is no doubt that global forces influenced the restructuring of the Jewish community schools in Johannesburg, and that global managerial and religious discourses dominated the language and the thinking of the stakeholders. These

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[65] Other stakeholder, 20 December 2001. [Document 62:8 (228:249). Codes: Jewish community - religious background].

[66] Community leader, 8 April 2003. [Document 72:13 (380:418). Codes: Jewish community - Zionism].

[67] Youth carrying the Jewish vision. *SA Jewish Report*, 25 October–1 November 2002.

[68] Other stakeholder, 6 March 2003. [Document 67:15 (317:337). Codes: Jewish community - religious background].

[69] Judaism in Johannesburg – strength in diversity. *SA Jewish Report*, 21–28 February 2003.

discourses set the boundaries of what is thinkable and reduce stakeholders' ability to generate a critical and democratic argumentation. Yet, the practices associated with these global forces were mediated by national, local and institutional cultures. It is evident that those in control were able to steer the above pressures in directions that served their interests. This supports Bottery's claim that global forces are contextualised and that there are convergences, as well as divergences, between the different levels of global manifestations, that is, national, local and institutional (2000:24). The divergence and convergence of these influences created conflicts and contradictions within the context of the Jewish community schools, as the following examples will demonstrate:

First, the uncertainties of living in unstable and transitional global and local contexts have produced a yearning for order and security, as well as fears. Both managerial and religious discourses addressed these fears and claimed to rescue the community schools from chaos. Yet both created division, suspicion and fragmentation.

Second, the CEO's knowledge of both managerial and religious concepts enabled him to play into people fears and insecurities and thus use the discourses to his advantage. The community's receptiveness to charisma played an important part in achieving consent to the restructuring. At the same time it also created an equally strong, hostile response and polarisation.

Third, in times of national economic austerity and global neo-liberalism emphasising privatisation instead of welfarism, the financial turnaround generated support from those who had historically financed the institution, such as donors and bankers, from lay leaders who were held responsible for the schools' finances and from parents who had to pay the increasing fees. Yet, it alienated the teachers that had to work "more for less" and the parents who had to pay more for the services. The fact that the CEO personally financially benefited from the financial recovery increased suspicion among parents and other stakeholders who were reluctant to raise funds for the schools. Thus the financial recovery created both strong negative and positive feelings from the same group of stakeholders.

Fourth, micro-political struggles in the schools created a new power elite that comprised administrators and other compliant managers, while it marginalised the teachers and other professionals. This sat well with the global elevation of the managers' position and the devaluation of professionalism. Lack of effective

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resistance and diversity among stakeholders supported the restructuring by default. Even though many stakeholders shared hostility to the autocratic mode of change, they were not able to produce any alternative or to establish a core that would unify them beyond their antagonism. Their preoccupation with the CEO blinded them to the complexity of Jewish education and to the broader contexts within which the restructuring took place.

Fifth, the South African transformation to democracy and its forging of a national identity elevated the role of religion and discouraged the Zionist/national/secular character of the Jewish community schools, identity that was artificially maintained by the apartheid regime with its emphasis on separate development based on ethnicity (see Chapter 3). The emphasis on religion created synergy with global and local tendencies and with the decline of secular Zionism. The intensification of identity based on religion conflicted with the democratic rhetoric in South Africa and its advocacy of tolerance and diversity, yet it was supported by the power relations within the community and by the dominance of the Ultra Orthodox faction.

Sixth, most significantly, the hegemonic position of the market solution interacted well with the hegemony of the Orthodox/Ultra Orthodox perspective in the community. These hegemonies were further enabled by selected processes and by the unique character of the community. These include the type of its religiosity, the crisis in its predominantly Zionist identity and the absence of a competing ideology, the elevating of the rhetoric of homogeneity and consensus, the prevalent lack of open debate, a tradition whereby the authority of those in power is not questioned, and the nostalgic yearning for the maintenance of the *Mitnagdim*/Orthodox/Zionist/cohesive narrative of the "imagined" community.

One would hope that the short episode of the restructuring would make people aware of the consequences of being under a regime of religious extremism, and would alert them to explore the changing direction of the "imagined community". However, with the endemic lack of self-introspection and deliberation, the weakening of the "left" and the hegemonic status of the "right", there is no visible force that would counter the schools' shift towards the "right", and there is very little prospect that open debate and democracy would be encouraged. While the borders of the school community became narrower, at least in rhetoric, and more Ultra Orthodox/Orthodox teachers were employed at the schools, the counterforce that was created may not

persist. Even the temporary community that was created by the United King David Action Group (UKDAG) was not able to overcome their diverse interests after they achieved the dismissal of the CEO. Many of the more liberal parents became weary and disillusioned. As shown in Chapter 6, the management of the Jewish community schools continued to be secretive and authoritative. Instead of the CEO, the coordinator of Jewish Studies was appointed as the acting director and the vice-chairperson became the chairperson. To date (March 2004) there is still no open debate on the goals and mission of Jewish education. At the same time more "road shows" are currently performed to promote the schools to the parents. Yet, as was indicated before, the research can only provide a snapshot of the restructuring process and its immediate impact. The long-term effects are still to be seen, and it is hoped, researched.

Shamai (2000) uses the term "cultural shift" to denote the change from cultural dominance to non-dominance or even to subordination. He uses it to describe the situation in the Israeli education system, whereby – owing to historical and political events, such as the coalition between political parties – hegemony over culture and over curriculum moved from secularism to religiosity. This resulted in the secular majority losing its dominance to the religious minority. Apple (2001:53) likewise maintains that the "New Right" authoritarian populist movement in the United States is exceptionally powerful and influential beyond its numbers owing to the immense commitment of its activists, its large financial base and the aggressiveness by which it pursues its agenda.

This study of the restructuring of the Jewish community schools in Johannesburg exhibits a similar process of cultural shift. The managerial restructuring accelerated the shift, but the haste with which it was imposed and the obvious lack of integrity in the process, caused a strong counterforce that managed to slow down the process. Yet it is argued in this chapter that there are various global and local factors that are likely to support the continuation of both the managerial and the religious restructuring, albeit in more subtle ways. Such is the work of hegemony.

Chapter 8
Explaining change

Managing a faith-based community school is a complex task; changing it is even more daunting given the strong organisational and religious networks as well as the familial and personal relations among stakeholders. The broader intellectual questions emerging from this study include the following: What does the restructuring of the Jewish community schools tell us about the management of complex change? What does it tells us about new managerialism as a mode of change? What does it tell us about the effect of globalisation on community schools? What does it tell us about community as ideology? And what does it tell us about researching one's own community?

It is evident that the restructuring of the Jewish community schools was not a neutral process aimed at cutting expenses and ensuring the financial viability of the schools, but constituted a site for political and ideological struggle over the identity of the schools and, by extension, control over the community's "common sense". The managerial restructuring became a means to reconstruct a new identity for the school community and to clarify its boundaries. The zeal with which the old bureaucracy was discarded and the past invalidated, indicated an aspiration to establish a "born again" community school based on both new managerial practices and religious extremism. It seems that at the time of uncertainties and crises – political, social and financial – both market and religious fundamentalism provided the only foreseeable solution for the leaders of the community, and excluded debate on any other possibilities. While I do not intend to draw a direct correlation between globalisation and the restructuring process, it is easy to identify the local expression of two globalised processes in operation: the one force pulled the Jewish community schools towards market solutions and managerialism, while a parallel force intensified its search for identity and community. The evidence shows that the market solution provided some short-term financial relief that might not, however, have been sustainable in the long term in the context of community schools. The surge for identity, on the other hand, created divisions, polarisation and exclusion. This inquiry made it clear that both forces failed to provide the envisaged certainty and order. Both forces failed to manage a coherent educational change process. Both forces undermined the democratic rights of the stakeholders and their human worth. Their

convergence enabled the creation of an illiberal community wherein open debate was curtailed and the voices of the stakeholders were ignored. In this context, inexpensive or "religiously correct" teachers took precedence over experienced teachers; rules, procedures and contracts attempted to replace community loyalty and commitment; coercion, indoctrination and some more subtle methods of persuasion threatened the perceived broad religious base of the community by encouraging a particular religious worldview which, in the long run, might close the mind of a new generation to open reflection and critical thinking. Both forces devalued the ethos of care in the schools and democracy.

In this dissertation I argued that a community in crisis might find it difficult to escape the allure of both new managerialism and religious extremism, but in spite of the perceived inevitability of the change, the restructuring process failed because it was based on a coercive top-down mode of change, which disregarded basic features of complex educational change – such as the context, culture and agency of the stakeholders. The study suggests that new managerialism as a mode of change could only provide episodic relief while undermining the long-term goals of education. I further argue that new managerialism created synergy with religious extremism, with both dynamics acting to undermine the community and democratic values of the schools. This chapter elaborates on these arguments and suggests that the managerial restructuring facilitated the transformation of the community schools into ghetto schools. I end this chapter with a reflective passage on the research whereby I propose that researching one's own community increases one's feeling of alienation and isolation from that community.

The restructuring of the Jewish community schools in light of the literature regarding educational change

This inquiry has confirmed the limits of the technicist and rational managerial approach to educational change, specifically because it ignores the complexity of change; its embeddedness in the context and agency of the stakeholders.[1] The study also demonstrated the short sightedness of the restructuring process that implemented changes in a ruthless and autocratic manner, and revealed the importance of trust,

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[1] See Chapter 2, with special reference to Fullan, 2001; 2001a; and Hargreaves, 2003; 1997.

credibility and integrity fro a successful process of change. In the next section I will highlight a few of the reasons for its eventual failure.

The reasons for change were not understood

Complex change, according to Fullan (2001a), must provide meaning to those who need to initiate or implement it. In terms of the restructuring of the Jewish community schools, the financial crisis was portrayed and accepted as self-evident. There was therefore no strong resistance to the retrenchment process and to other measures to cut expenses, even though they were ruthlessly implemented with little regard to the educational and human costs. The necessity of these budget cuts were acknowledged and accepted as crisis intervention measures. However, when there was simultaneous capital expenditure despite the crisis, the process began to lose its coherence and subsequently the stakeholders' support. Moreover, there was no consensus among key stakeholders on the needs for changing the ideological and educational aspects of the schools (which does not mean that they were adequate). Once the restructuring tampered with those areas that were perceived as successful and formed the basis of the "imagined" community of the schools – such as the educational achievements and the maintenance of a broadly national-traditional ethos – it was resisted.

Lack of trust in the process or the people

Trust – as well as its counterpart, betrayal – is emerging as a vital component in sustainable school improvement (Hargreaves, 2004). The stakeholders of the Jewish community schools could not identify who was behind the process and whose interests it served. The anonymity and secrecy that surrounded the restructuring process, the fact that the CEO was envisaged to benefit financially from the restructuring as well as his association with Ultra Orthodox outreach movements, increased stakeholders' suspicion that the restructuring was devoid of integrity and that it was motivated by hidden agendas. Moreover, the restructuring was based on the principle of "divide and rule", which spread suspicion among colleagues and attempted to undermine authentic relations. Once the stakeholders lost trust in the leaders of the change, in their colleagues and in the processes that were initiated to make the schools more efficient, the restructuring began to falter. With the lack of trust even changes that were perceived as desireable were not implemented.

The change was too broad, hasty and incoherent

It is suggested that the short-term contract of the CEO, the pressure to show quick, visible changes (both religious and financial) coupled with the fundamentalist zeal to destroy the "rotten" Jewish community schools, resulted in ad-hoc, impulsive changes before any attempt was made to understand the culture of the organisation and the context of change. The CEO embarked on a comprehensive reform that would simultaneously change every aspect of the schools. How and what to do was learned "on the job". The CEO instituted, changed and withdrew policies whenever he encountered resistance or implementation problems. This resulted in the absence of a clear map of change and in a lack of coherence. Eventually teachers learned to ignore most of the rhetoric. This created a huge gap between the official rhetoric and daily reality, whereby real changes hardly occurred. It seemed that most of the policies had a symbolic rather than a substantive impact in order to signal ideological and managerial shifts. This is referred to by Jansen (2001) as political symbolism that is employed to mark the shift from an old to a new regime.

Key staff was not involved

It is clear that no change is possible at a school without the active support of the key staff members. In order to institute a comprehensive programme of change, the CEO attempted (with little success) to dismiss all those in top positions who might resist his policies and to replace them with compliant managers. The research has shown that the inability to control some of the key staff motivated the CEO to establish new structures – such as a middle school at each campus – thereby allowing for the employment of new and compliant key staff. Even though some compliance was achieved, it resulted in fabrications, bullying and further polarisation. In some instances managers who were not able to deal with the changes showed a tendency to revert to more centralised decision-making and authoritarianism, which caused further alienation of the teachers and lack of support for the process. Underestimating the power of the key staff members and the trust that existed between them and other stakeholders, eventually led to the CEO's departure.

The process ignored the emotions of change

As indicated in Chapter 2, the CEO was employed specifically because he was perceived to be able to ignore the emotions of change and because he was an outsider

to the school community, and was therefore not personally involved with the stakeholders. The perception was that the schools needed a change process that was based on a technicist, rational decision-making process, implemented by a henchman who would ruthlessly downsize the organisation and introduce proper managerial procedures mimicking business practices. This attempt to ignore the emotions of change resulted in outbursts of negative emotions. Certain feelings – such as fear, isolation and guilt – were exploited in order to gain support for the restructuring and to shame stakeholders into compliance. This impacted negatively on teachers' relations with pupils and on their teaching practices, as teachers blocked their feelings and attempted to separate themselves from their work. Holding emotions back seems to be the only aspect that teachers were able to control. The festering of negative emotions had a negative impact on the school community as stakeholders were turned against each other, creating "a community of suspicious minds" (Hargreaves, 2003). The lack of trust and the feelings of helplessness and disempowerment eventually hijacked the restructuring process and created the counterforce that brought it to an end. This supports Hargreaves's warning that:

> If educational reformers and change agents ignore the emotional dimensions of educational change, emotions and feelings will only re-enter the change process by the back door (1997:18).

Lack of understanding of the role of a leader

There is no doubt that complex change, especially in times of crisis, needs strong leadership. The restructuring of the Jewish community schools was based on a "super-leader" notion, whereby one man, by himself, took on a complex educational change without even visiting the schools or consulting with any key members of the institution. It appears that the only tools the CEO had for leading an organisation was his seeming control of education financial systems, his coercive style, his charisma and his ability to sway people's minds. The CEO's apparent failure confirms the limits of charisma as well as the notion that strong leaders are not necessarily those who are not afraid to "burn the place down", but rather those who can be "leaders of leaders" (Fullan, 2001) and "build the place up". The dissertation exemplifies the dependency and disempowerment that were created by a charismatic and coercive leader.

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While authoritarianism is not uncommon in ethnic/religious groups (Grace, 2002; Ignatieff, 1993), it is important to distinguish between authoritative and coercive leaders. Goleman (2000) suggests that while authoritative leaders seem to be the most effective, especially in times of crisis, coercive leaders are the least effective. The coercive leader's extreme top-down decision-making process kills any new ideas and creativity. People feel disrespected; they lose their sense of ownership, pride in their work and commitment. While it might work for a short time in extreme cases, a continuous reliance on this management style once the emergency has passed, would impact negatively on an organisation.

Fullan (2001) maintains that leaders of complex change processes need to learn to think slowly (despite the need for a quick response), to learn in context and to cultivate leaders at all levels of an organisation. I believe that, above all, they need wisdom. Wisdom, as defined by Sternberg, is *'the application of tacit knowledge as mediated by values towards the goal of achieving common good'* (2001:4). In Sternberg's theory, common good refers to what is common for all, not just for those with whom one identifies. It is not enough for leaders to have practical intelligence and the ability to manipulate a situation to benefit themselves or those of a particular group at the expense of others, but rather wisdom to attend to the common good.

Lack of respect for human agency and dissenting voices

In the restructuring of the Jewish community schools, dissenting voices were silenced and resistance towards the top-down change was ignored. The CEO surrounded himself with people who agreed with him or with those he could control, and therefore did not test his ideas on stakeholders with diverse ideas and experiences. This resulted in a lack of implementation, demotivation, fabrication and a waste of human creativity and energy. While overt and covert coercive measures were employed in order to break the resistance, these were not successful. This exemplifies the limits of imposed change processes and coercive leadership – both ignore traditional patterns of collegiality and professionalism, the notion of the schools as loosely coupled organisations (Weick, 1976), as well as the agency of the stakeholders. Agency, according to Wallace and Pocklington (2002), is not narrowly determined by structures and no one has absolute control over anyone else.

Ignoring the context of change

The attempt to impose a new structure on the Jewish community schools as if it had no history and no culture obstructed the process and was instrumental in its failure. Educational reform is not only about change; it is also about continuity. History cannot be swept away (Bowe et al, 1992:141). It is not simply a matter of "off with the old and on with the new". Schools develop ethos and culture; practices become routinised; commitments, relations and emotions are embedded in the context in diverse ways, not easily revealed to an outsider. While it is often vital in times of crisis to bring into a school an outsider who is not embedded in the context, he/she can ignore the culture and the history of the institution at his/her own peril. Attention must be given to the complex interrelationship of many factors that influence the structure and the cultures of schools. Reimer and McGinn remind us that *'the defining features of education systems are their complexity and the complexity of the external environment where they operate'* (1997:43). A simple managerial solution to a complex social, ideological and cultural dilemma could therefore not be sustainable.

New managerialism in the context of a faith-based community school

In Chapter 2 I explored some of the main differences between managerial culture (*gesellschaft*) and community culture (*gemeinschaft*). The aim of this section is to revisit these dichotomies and to explore how they played out in the restructuring of the Jewish community schools. Throughout the dissertation I emphasised the contradictions as well as the convergence of these two cultures, and demonstrated the connections within the discourses. My main thesis is that the rhetoric of new managerialism was successful in masking religious extremist undertones because of the synergy that existed between these forces. This expands Apple's (2001:24) contention on the symbiotic relation between religion and economy. According to Apple, in the same way that the Calvinist emphasis on hard work, saving and asceticism was closely related to the needs of the capitalist society, the global market economy which allows for personal accumulation of wealth and choice is mirrored in the fundamentalist notion of "born again". The following section thus identifies the elements within the two discourses that inform and shape each other, as well as their impact on the Jewish community schools.

School as a business versus school as a public good

The global "epidemic" of market-led restructuring affected (infected) the Jewish community schools, which in a time of economic crisis followed the business route to save it from collapse. The evidence shows that stakeholders at large accepted the discourse, which confirms the dominance of the managerial discourse based on its promises of certainty, order, stability and better value for money. This hegemonic position of the discourse, especially among stakeholders who were exposed to the corporate world, blinded them to the contradictions therein, the basic one being: Whose interests should education serve? The corporate world is designed to generate profit. The danger in judging education by the monetary profit it generates and, above all, remunerating its managers in terms of this profit, is that education would be dragged into the competitive and harsh world of business. On the other hand, "public good" is a complicated concept as it requires definitions of both the public and the public good.

The restructuring of the Jewish community schools served the interests of the alliance that was forged between the business elite and the Orthodox alliance, whereby the Ultra Orthodox minority was able to shift the discourse towards an extremist direction. The public was narrowly defined as those who complied with their demands. Those who disagreed could leave the schools and, by extension, the community. Moreover, in the harsh environment that was created in order to generate monetary and religious gains, stakeholders were struggling for self-preservation. This jeopardised their loyalty to each other and increased fragmentation, distrust, alienation and the loss of community.

Parents as partners versus parents as customers

Parents' role in the context of a faith-based community school is inherently contradictory, wherein private interests need to be balanced with public interests. The emphasis on the role of parents as customers exacerbated this tension. Based on the managerial culture parents were given, at least rhetorically, more power over the education of their children, as well as choice. This increased their aspirations to have a say in the shaping of their children's education. At the same time, parents' rights challenged what was perceived to be the authority of the religious establishment. In this context parents were viewed as a congregation and not as customers. As a congregation, schools have the right to exclude or include members as part of its freedom of association (Strike, 2000).

The notion of parents as customers was used to discipline the teachers, while the parents' voice was respected only when it echoed those of the authorities. Parents were given the choice of either accepting the product as designed by the authorities or leaving the schools. It seems that in the tension between "schools mirroring the community" and "schools shaping the community" the intentions were first to shape the product and then "to educate" the parents to fit in with the product. This process of "shaping the customer" (Robertson, 1998) would result in shaping the community's common sense, and strengthening the Orthodox hegemony.

I contend, therefore, that the managerial notion of parents as customers negated the community culture of parents as partners, but created synergy with the religious facet of the restructuring, as both religion and business tend to shape customers to believe in their product.

Accountability versus commitment

In the restructuring of the Jewish community schools, the discourse of accountability, teachers' appraisal and performance-related pay were a gloss for control and cost cutting. It was resisted, as it was perceived to undermine teachers' commitment that was based on community loyalty rather than professional accountability.

It is argued that instead of capitalising on the collaboration and the feeling of mutual fate that existed among members and to move it forward towards professional collaboration, the restructuring focused on breaking these authentic relations, thereby establishing a new organisation based on contractual relationships. This organisation, according to Strike (2000), cannot be described as community, since it is held together by contracts instead of by the cooperation between members.

It is suggested that while accountability negated the community culture, this is one of the characteristics of a fundamentalist-type group, which requires strict adherence to standards and rules of observance.

Efficiency versus care

The evidence shows that while the Jewish community schools might have had some short-term financial relief, the drive for efficiency was not sustainable as it ignored the culture of the institution, such as its hierarchical structure, and the agency of the stakeholders. The drive for efficiency affected the schools in various ways, including: making teachers work "more for less"; the replacement of loyal employees with

cheaper ones without a visible attempt to retain necessary skills; the commodification of the schools' products and services, and in some instances, such as remedial education, shifting costs to parents; and concentrating on the measurable and devaluating functions that cannot be audited but were regarded as the added-value, such as the outreach programme, *Ulpan*, *Bat-Mitzvah* ceremony, etc. Subsequently, this impacted on teachers' commitment, motivation, cooperation and on the emotional bonds between pupils, parents and colleagues.

I argue that the efficiency drive was not neutral and that funds were shifted to advance political and ideological agendas, such as changing those in power and investing in programmes and people that would strengthen the religious base of the schools. While the various means to improve efficiency impacted negatively on the relations among the school community by increasing division and rivalry, they facilitated the ultimate shift of the schools to the "right".

Community needs versus individual needs

This is a complex terrain as it raised questions about the essence of the community and the difficulties of defining its needs. In managerial culture, community is described as a "stakeholder society" in which diverse needs are accommodated by a decentralised system. In the community culture, needs are centrally decided by the majority or by their representation in a central bureaucracy.

Despite the rhetoric of decentralisation and stakeholders, the needs of the Jewish community schools continued to be centrally defined. The elections to the Board at the Board conference clearly demonstrated that representation was manipulated to fit in with the view of the authorities rather than with the majority of the school community. The restructuring was therefore instrumental for an envisaged "cultural shift" whereby the non-observant Orthodox majority lost its dominance to the religious minority through political manipulation.

Decentralisation and the notion of stakeholder society stand in opposition to the elevation of a strong leader. This points to a paradox within the discourse of new managerialism. However, it creates affinity with the religious concept of a strong charismatic leader. This is especially relevant to fundamentalist-type communities, which are usually centred around charismatic leaders who demand respect and total obedience.

Certainty versus uncertainty

Democratic processes inherently produce uncertainties, as different needs and opinions have to be exposed, negotiated and compromised. In bureaucratic management, the notion of professional autonomy as well as democratic decision making processes, are essentially uncertain and unpredictable. Admittedly, this often results in no decision-making and in maintaining the status quo despite mounting contradictions and frictions. Certainty increases as one moves towards total community, whereby patterns of behaviour and goals are clearly defined; membership in the community requires total allegiance to its dictates. In the context of the Jewish community schools, both managerialism and religion claimed to provide the parameters and the security of being in an orderly community.

The certainty–uncertainty conflict created division between those stakeholders who were ready to accept the uncertainty of democratic processes, and other stakeholders who preferred the certainty of religiously and managerially defined goals and patterns of behaviour.

In the restructuring of the Jewish community schools, the notion of certainty based on standardisation, homogeneity, predictability and accountability systems, contradicted the liberal notions of individualism, achievement and teachers' autonomy, yet created a synergy with the notion of religiously homogenous community. The rhetoric, however, did not increase security but rather increased divisions and micro-politics within the schools. Moreover, it was clearly evident that some of these insecurities were manufactured in order to increase complexity and chaos, thereby increasing the yearning for order and certainty. This tactic is used by both religious extremism and corporatism, as both forces organise themselves on the basis of people's fears and insecurities.

Implicit versus explicit shared goals

The restructuring of the Jewish community schools was an attempt to establish clear and narrow goals that tended to focus on the short term and the quantitative, at the expense of the broader, vague and long-term goals of the organisation. The latter tends to be flexible enough to accommodate diversity. In this tension, the corporate demand for clear goals and mission create synergy with the religious "blue print".

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The debate over goals exemplifies the tension between the concepts of culture as changing and culture as a fixed entity. Religious institutions as well as corporatism advocate the latter. While some adaptation to the contemporary context is unavoidable, the constitutive elements are not negotiable. However, consensus and shared goals have the propensity to discourage critical and individual reflection and contrive to eliminate pluralism and the associated conflict of values. This negates Sennet's (1998) notion of community as a scene of conflict where people learn to negotiate diversity and difference, and privileged the notion of religious community or congregation, which focuses on like-minded people and excludes the "others".

The lay leaders of the Jewish community schools tended to emphasise unity as a source of strength and to curtail open debate on goals and mission in order not to "destabilise the community". Yet this proved to be a shortsighted practice as it obscured the power relations and allowed certain individuals to take over the community schools to further their own interests and positions. It also resulted in alienating many members of the community, depriving the community of creativity and lateral thinking. This could jeopardise the sustainability of the community and often results in it becoming more authoritative and closed-minded.

Inclusivity versus exclusivity

A central dilemma for the Jewish community schools was: How porous could the borders of the community be without it losing its identity?

Two contradictory forces were in operation. One force, the liberal/democratic voice, demanded a broadening of the borders of the community to the extent that the schools' *raison d'etre* might be compromised, by making them multicultural schools instead of Jewish schools. The opposite force demanded narrowing the borders to include only those Jews who adhered to a single interpretation of Judaism, thus combating pluralism and relativism within the religion. In the past the identity of the Jewish community was based on ethnicity rather than religion (Shimoni, 1999), thereby perpetuating some kind of ethnic democracy (Smooha, 2002). With the shifting of local and global identities, religion tended to replace ethnicity as a source of identity, bringing divisions and polarisation into the community. At the same time that religion polarised the community, its tendency for clear definitions in order to avoid confusion and doubts created synergy with the corporatist quest for cultural

homogeneity that would make the organisation more efficient and predictable and consequently, better controlled.

Community of memory versus instant communities

New managerialism creates instant communities based on contracts and rules, by defining its borders and clientele as well as its mission. Building community in the managerial culture is therefore a generic skill that can be applied irrespective of context. The same applies to fundamentalist-type "born again" groups whereby the old identity is discarded and a new, instant identity is established. In theoretical terms the *gesellschaft* is used to build a new *gemeinschaft*. While affinity between the managerial culture and religious extremism exists, it contradicts the notion of community as one that develops over time, that is, community of memory.

The process of discarding the old community and the attempt to build a new one was evident in the restructuring of the Jewish community schools. The old was described as "bad" while the new was "superb", even if the new was appropriated from the old. Yet the restructuring of the Jewish community schools also demonstrated the resilience of the narrative of the "imagined community", as stakeholders joined together to defend it. It was argued, nevertheless, that the school community, based on its authoritative history, does not seem to have the tools to negotiate diversity and to bridge its differences. Therefore, it is still a vulnerable community open to the adverse affects of global and local processes.

In sum, I have argued in this dissertation that new managerialism in the context of faith-based community schools was instrumental in intensifying the faith mission of the schools, while undermining their communal values and their fragile democracy. I have further maintained that this process was enabled by the synergies that exist between new managerialism and religious extremism. Both forces are based on dogmas that are unchallenged: there is no alternative to market; and there is only one truth and one way of practicing religion. They both claim to be just forces that would correct past inequalities and establish an instant, orderly society based on either religious fundamentalism or on the fundamentals of the market. Yet they both utilised manipulative strategies with a clear separation between means and ends. They both depend on strong, charismatic leadership and they both require "enemies" to justify their existence. For new managerialism the enemies are the old bureau-professionalism and teachers' autonomy. For religious extremism the enemies are

relativism and liberalism. Both forces define and exclude the "other" and have expectations regarding adherence in terms of performance and standards.[2] Furthermore, both new managerialism and fundamentalism flourish under certain conditions, such as transitional and insecure times, lack of knowledge and authoritarian backgrounds. Both forces are supported by a power bloc that benefits from these processes, yet the call for homogeneity obscures this power relation. Both trade on people's anxieties and fears. In both instances adherents unwittingly play an active part in their own eventual subordination.

The question is: Could a community be resurrected in order to counteract the negative effects of new managerialism? This will be the topic of the next section.

Could community schools be a redemptive solution to the perils of globalisation?
This dissertation suggests that even faith-based community schools might not be able to withstand the perils of globalisation and that the forces of both "Jihad and McWorld" (Barber, 2001) undermined the educational as well as the community values of the schools. The search for identity has threatened the broad constitutive elements of the community, shifting it towards parochialism, exclusiveness and separatism. The managerial culture (*gesellschaft*) and its emphasis on contracts, performance, standards and accountabilities forced the community culture (*gemeinschaft*) to change by emphasising a clearly defined identity and demarcated boundaries instead of vague membership in a relatively inclusive and liberal community. The *gemeinschaft* derived from the face-to-face interaction of Tonnies's 19th century vision of community, has been reconstructed by the *gesellschaft* of managerialism as an inclusive and illiberal community. In this context, community means sameness and homogeneity and exclusion of the "other". Bauman maintains that in the search for safe community of like-minded people we create *'a bizarre mutant of voluntary ghettos'* (2001a:117). Voluntary ghettos differ from real ghettos. The latter are places from which their insiders cannot get out, while the purpose of the voluntary ghetto is to bar outsiders from going in. Yet they both have the same suffocating effect as they have the capacity to self-perpetuate their isolation: the safer one feels inside the ghetto, the less familiar and more threatening appears the world outside, and more and more courage is needed in order to venture out. Bauman

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[2] See also Hargreaves (2003) for comparison between system of performance training and sects.

therefore maintains that ghettos mean the *'impossibility of community'* (ibid:122). The suffocation felt by the residents and the feeling of "no other alternative" create social disintegration and atomisation. These processes were clearly identified in the way stakeholders of the school community turned against each other in order to ensure their safety within the "ghetto" as there was no other choice. Those who controlled the gates of the community could thus impose their rules and tighten control. Once locked into this context, the community ethos was devalued and greater adherence to religion was demanded. Moreover, the discourse of the homogenous community does not acknowledge differences in privilege or power, and is therefore a weak form of community whereby people turn against each other as the only expression of their powerlessness, disempowerment and isolation. The on-going prominence of homogeneity and unity as a source of strength contradicts the notion of community as a scene of conflict wherein people learn to live together in spite of their differences. It is thus concluded that the global surge for community in the context of the Jewish community schools in Johannesburg was expressed by the intensification of a particular interpretation of Jewish identity that undermined the community. The hegemony of the managerial discourse enabled the reconstruction of a new (global) identity which contradicted the traditional South African Jewish identity, yet was paradoxically facilitated by the unique features of the community, specifically its emphasis on unity rather than diversity and lack of intellectual enquiry and critical debate. Subsequently, identity has replaced the community. I therefore concur with Bauman that:

> Identity owes the attention it attracts and the passion it begets to being a surrogate of community: of that allegedly "natural home" which is no longer available in the rapidly privatised and individualised, fast globalising world, and which for that reason can be safely imagined as a cosy shelter of security and confidence, and as such hotly desired. The paradox, though, is that in order to offer even a modicum of security and so to perform its healing role, identity must belie its origin, must deny being just a surrogate, and best of all needs to conjure up a phantom of the self-same community which it has come to replace. Identity sprouts on the graveyard of communities, but flourishes thanks to its promise to resurrect the dead (Bauman, 2001:151).

Is there a way forward?

Apple (2001) maintains that the success of the rightist alliance is never guaranteed, as there are counter-hegemonic movements and people that have not been integrated under the hegemonic umbrella. He therefore tends to adopt a position which he calls

'optimism, but without illusions' (ibid:62) that there is a hope for a better society, where people would realise that the shift to the "right" may actually be "wrong" since it *'stifle[s] or trivialise[s] a vision of democracy that is based on the common good'* (ibid:230).

One could argue that the stakeholders' resistance to the restructuring of the schools demonstrates that even in a small, relatively closed Jewish community, which does not encourage debate or critical thinking, there is a place for agency and resistance. It could therefore be argued that the power of both religious and market fundamentalism is not definite and there are pockets of resilience and counter-hegemonic activity. While this might be the case, I feel less optimistic than Apple (ibid) in the context of the Jewish community in Johannesburg. Despite the episodic success of the parents' movement, their resistance mostly focused on the CEO as an individual, with less engagement with the broader local, never mind national or global, concerns. The long-established emphasis on homogeneity and the absence of critical thinking was and continues to be a serious hindrance to any counter movement. This is especially so since a community of sameness has a propensity for self-perpetuation and is difficult to arrest, let alone stop (Bauman, 2001a:103). As much as the liberal-minded parents or community members may deplore this state of affairs, there seem to be no political agents in sight who are interested in or capable of breaking this vicious circle. The small group of liberal thinkers is either indifferent to communal affairs, or do not want to "rock the boat" and thus jeopardise their position within the community, or has retreated after futile attempts to affect the community's common sense. On the other hand, there is a power bloc that acts in relative unison to perpetuate the exclusivist trend and to reinforce the boundaries of the community. Furthermore, most of the communal institutions in Johannesburg are now managed by members of this "rightist alliance" and it is unlikely that they will relinquish their positions. I therefore share Michael Ignatieff's rather pessimistic view after he completed his journey through various ethnic nationalities:

> If it is a battle between liberalism and ethnicism I know which side I am on. I also know which side is winning right now. … I started my research as a liberal, I still am, but I cannot help thinking that the liberal education, tolerance, compromise, debate and reason, cannot be achieved by those who are apathetic or immobilised by fear or self interest (1993:189).

Reflections

I come to the end of a very exciting and demanding academic and personal journey, which spanned a period of three-and-a-half years. I did not choose the route. I was thrown into the research by a twist of fate and by global and local processes that I could neither identify nor define when I began this voyage. I know that I have only touched the tip of the iceberg, and even at this point I had to compromise depth for breadth. Researching the community in transitional and unstable times was an emotional endeavour imbued with conflicts, compromises and anxieties. Uncovering processes within the community, questioning its ethos and narrative, and becoming aware of the power relations, have increased my feelings of alienation from the community. Bauman (2001a) describes this process as the "agony of Tantalus". According to Greek mythology, Tantalus was guilty of acquiring/sharing knowledge which neither he nor other mortals like him should have had. He was therefore not allowed to partake in the company of the gods at Olympic feasts. The biblical story of Adam and Eve gives a similar message. Adam and Eve's penalty for eating from the tree of knowledge was their banishment from the safety of the Garden of Eden, from paradise. An "imagined" community provides a sense of paradise and is a safe haven for those who accept and submit to its narrative. However, '*loss of innocence is a point of no return'* (ibid:9), and I feel that I am now at this point. It is still to be seen whether I would be able to find a place within the community.

While I attempted to give voice to the different stakeholders in this research report, I anticipate that I will be criticised for emphasising a liberal view, some aspects of which do coincide with my own views. I accept that. This is, after all, my story and it offers a counter-discourse to the dominant Orthodox/*Mitnagdim*/Zionist/ homogenous narrative of the community. I hope that this dissertation will generate critical thinking and open debate, or at least give voice to those who have been sidelined by the narrative of the community. I am aware, as are many Jews around the world, of the unending tensions between religion and democracy, Judaism and Zionism, and Orthodox and Reform Judaism. Yet an easy managerial solution could only shift the debate towards a narrow fundamentalist interpretation of these complexities, which will increase division, polarisation and hatred. Lack of debate and open dialogue might only enable those with self-interest or religious zeal to dominant the community. I believe that the restructuring of the Jewish community schools may soon fade into relative insignificance, yet I hope that its lessons prevail.

Appendix 1

Set of propositions

1. The factors that led to the restructuring can be best explained in terms of four interlinking forces, namely: the introduction of new ideas; the pressure of competing interests; changes in the habitat; and the tendency of institutions to destroy themselves (Hood, 1994).

2. The restructuring process is based on a top down strategy of change, which might have short-term benefits, especially for the financial viability of the schools, but is likely to impact negatively on the sustainability of the reform and its educational benefits.

3. The restructuring process is based on an inherent tension between the commitment to market forces and the attachment to conservative and fundamentalist forces. This is likely to impact negatively on the coherence of the restructuring process.

4. Market-led reforms are likely to conflict with traditional culture and values in religiously based community schools.

   a. Marketization is likely to shift the emphasis in school culture and operations from community and shared needs, to the commodification of schools' produces and services.

   b. Marketisation of schools shifts the emphasis from the needs of the consumers, to competition with other schools. Thus the schools are likely to become 'institution responsive' instead of 'customer responsive'.

   c. Marketisation is likely to exacerbate the contradictory value system that exists within the curriculum of community schools: individualism, competition and performativity alongside values of collegiality, community and shared progress.

5. The marketisation of Jewish community schools inevitably generates role and value conflicts amongst stakeholders, which is likely to impact negatively on the restructuring process.

   a. Marketisation of schools inevitably generates role and value conflicts within a stakeholder group (e.g. teachers), which is likely to impact negatively on the restructuring process.

   b. Market-driven discourses and practices create divergent responses among various stakeholders: e.g. teachers resist and struggle to adapt to the new managerial culture, while parents accept, even celebrate, the emphasis on efficiency, effectiveness and performance-based pedagogies. This is likely to impact negatively on the restructuring process.

6. The restructuring of Jewish community schools – with its emphasis on strong management, efficiency, decentralisation and marketing – is best explained in terms of new managerialism.

Appendix 2

Data collection instruments

Table of contents:

Interview schedule A – Teachers

Interview schedule B – Parents

Interview schedule C – Managers

Interview schedule D – Lay leaders

Interview schedule E – Community leaders

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INTERVIEW SCHEDULE A - TEACHERS

Teacher name:
School:
Gender:
Age:
How many years have you been teaching?
How many years at the school?
What grade(s) do you teach?
What subject(s) do you teach?
Do you have additional roles in the school?

1. What is your understanding of the restructuring?
   a. Why did the restructuring occur?
   b. How did you hear about the restructuring? (When? Where?)
   c. What role did you play in the restructuring?
   d. What are the outcomes to date?
   e. Do you think that these outcomes will be sustained?

2. What is your opinion about the restructuring?
   a. What were your expectations with respect to the restructuring?
   b. What were your concerns with respect to the restructuring?
   c. What do you think about the process of the restructuring?
   d. What do you think are the major challenges facing the restructuring process?

3. How has the restructuring affected …
   a. your work as a teacher?
      i. your teaching load?
      ii. your teaching methods?
      iii. the content of your teaching?
      iv. your motivation?
      v. Are you expected to fulfil any additional roles as a result of the restructuring?
         (e.g. marketing, administration)
      i. Were you participating in any professional development since the
         restructuring?
      vi. Union affiliation.
   b. you personally?
   c. the ethos of the schools?
   d. the school's image in the community?
   e. the schools' finance?
   f. the religious base of the schools?
   g. the community services that the schools provide?
      i. Fee assistance programme?
      ii. Remedial education?
      iii. Social services?
      iv. Outreach programmes?
   h. your pupils?
   i. the curriculum?

4. How has the relationship changed since the restructuring between you and …
   a. your colleagues?
      i. When and where does the staff meet? For what purpose?
      ii. How would you describe the relationship between you and your colleagues…

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                1.   on a social level
                2.   on the professional level.

b. the parents?
       i. Individual parent
     ii. PTA and active parents

c. the school principal?
d. your HOD?
e. the Board?
f. the CEO?

5.   Can you direct me to another teacher who might disagree with you?

INTERVIEW SCHEDULE B - PARENTS

Parent name:
School:
Gender: Age:
Children's grades:
How many years have you been involved with the schools?
What made you be involved?

1.   What is your understanding of the restructuring?
      a.   Why did the restructuring occur?
      b.   How did you hear about the restructuring? (When? Where?)
      c.   What role did you play in the restructuring?
      d.   What are the outcomes to date?
      e.   Do you think that these outcomes will be sustained?

2.   What is your opinion about the restructuring?
      a.   What were your expectations with respect to the restructuring?
      b.   What were your concerns with respect to the restructuring?
      c.   What do you think about the process of the restructuring?
      d.   What do you think are the major challenges facing the restructuring process?

3.   How has the restructuring affected…
      a.   you as a parent?
      b.   your role in the school?
                  i.   Should parents have a voice?
                 ii.   What are the main issues debated in the PTA meetings?
                iii.   What are the limitations of parents' involvement in the schools?
      c.   your child?
      d.   the ethos of the schools?
      e.   The school's image in the community?
      f.   the community services that the schools provide?
                  i.   fee assistance programme?
                 ii.   remedial education?
                iii.   social services?
                 iv.   outreach programmes?
      g.   the religious base of the schools?
      h.   the teachers in the schools?
      i.   the schools' finance?

4.   How has the relationship changed since the restructuring between you and …
      a.   other parents?
      b.   other PTA members?
      c.   the teachers?
      d.   the principal?
      e.   the Board?

5.   Can you direct me to another parent on the PTA who might disagree with you?

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INTERVIEW SCHEDULE C - MANAGERS

Name:
School:
Gender:
Age
How many years have you been teaching?
How many years at the school?
What was your career path?
What are your roles in the school?

1. What is your understanding of the restructuring?
    a. Why did the restructuring occur?
    b. How did you hear about the restructuring? (When? Where?)
    c. What role did you play in the restructuring?
    d. What are the outcomes to date?
    e. Do you think that these outcomes will be sustained?

2. What is your opinion about the restructuring?
    a. What were your expectations with respect to the restructuring?
    b. What were your concerns with respect to the restructuring?
    c. What do you think about the process of the restructuring?
    d. What do you think are the major challenges facing the restructuring process?

3. How has the restructuring affected…
    a. you as a principal /deputy/HOD?
        i. your workload?
        ii. Do you have additional roles as a result of the restructuring? Instructional? Marketing? Administration?
        iii. your motivation?
        iv. Were you participating in any professional development since the restructuring?
    b. you personally?
    c. the teachers in the schools?
    d. the ethos of the schools?
    e. the school's image in the community?
    f. the community services that the schools provide?
        i. fee assistance programme?
        ii. remedial education?
        iii. social services?
    g. the outreach programmes?
    h. the schools' finance?
    i. on the religious base of the schools?
    j. the curriculum?
    k. the pupils?
    l. The parents?

4. How has the relationship changed since the restructuring between you and …
    a. your colleagues?
        i. When and where do the management meet? For what purpose?
        ii. When and where do you meet with managers from other schools? For what purpose?
    b. the teachers?

       c.   the parents?
           i.   Individual parent
          ii.   Active parents – member of the PTA
       d.   the CEO
       e.   the Board?

5.   Can you give me 5 names of teachers that represent different age group, different experiences and different attitudes towards the restructuring?

INTERVIEW SCHEDULE D - LAY LEADERS

Name:
How would you describe your involvement with the schools?
What made you be involved?

1.   What is your understanding of the restructuring process?

2.   What is your opinion about the restructuring?
        a.   Why did the restructuring occur?
        b.   What were your expectations with respect to the restructuring?
        c.   What were your concerns with respect to the restructuring?
        d.   What are the outcomes so far?

3.   What do you see as the long-term goals of the restructuring?

4.   What do you see as the short-term goals of the restructuring?

5.   What do you see as the major possibilities or opportunities for the successful implementation and sustainability of the restructuring?

6.   What do you see as the major limitations or constraints with regard to the implementation and sustainability of the restructuring?

7.   How has the restructuring affected…
        a.   the schools' finance?
        b.   the ethos of the schools?
        c.   the school's image in the community?
        d.   the community services that the schools provide?
                i.   fee assistance programme?
                ii.   remedial education?
                iii. social services?
                iv.   outreach programmes?
        e.   the religious base of the schools?
        f.   the curriculum?
        g.   the teachers?
        h.   the pupils?
        i.   the parents?
        j.   the principals?

8.   How would you describe the relationship between you and …
        a.   the parents.
        b.   the principals.
        c.   the HODs?
        d.   the members of the Executive.
        e.   the community leaders and donors.

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INTERVIEW SCHEDULE E – COMMUNITY LEADERS

Name:
How would you describe your involvement with the schools?
What made you be involved?

1. What is your understanding of the restructuring process?

2. What is your opinion about the restructuring?
    a. Why did the restructuring occur?
    b. What were your expectations with respect to the restructuring?
    c. What were your concerns with respect to the restructuring?
    d. What are the outcomes so far?

3. What role did you play in the restructuring?

4. What do you see as the long-term goals of the restructuring?

5. What do you see as the short-term goals of the restructuring?

6. What do you see as the major possibilities or opportunities for the successful implementation and sustainability of the restructuring?

7. What do you see as the major limitations or constraints with regard to the implementation sustainability of the restructuring?

8. Are you aware of how has the restructuring affected …
    a. the schools' finance?
    b. the ethos of the schools?
    c. the school's image in the community?
    d. the religious base of the schools?
    e. the community services that the schools provide?
        i. fee assistance programme?
        ii. remedial education?
        iii. social services?
        iv. outreach programmes?

9. How has your involvement in the schools changed since the restructuring?

Appendix 3

Letters to interviewees

Chaya Herman
P.O. Box 650459
Benmore 2010

Date …

Dear

I am a Doctoral candidate at the University of Pretoria in the Department of Education Management and Policy Studies, led by the Dean of the faculty, Professor Jonathan Jansen. My main research interest is educational change at individual and institutional level. The research is conducted in the specific context of Jewish education with focus on the restructuring process.

It would be greatly appreciated if I could enlist your support for this research and if you would be willing to grant me an interview, sharing your insights with regard to Jewish education. Your participation is completely voluntary. With your permission, I will make an audiotape of the interview for the purposes of getting the most accurate and completed record. The interview will take approximately one and a half hours.

The research is under the scrutiny of rigorous academic safeguards to ensure discretion and the protection of individual privacy. Therefore:

1. Anonymity and confidentiality will be maintained at all time. Your name will not be mentioned in any other interviews or in the report. You will be identified by code or by position, e.g. principal, teacher, parent.
2. Data (tapes and transcripts) will be analysed by myself, and after being held for a prescribed length of time for reanalysis, will be destroyed. This will apply to any written documents that you will be able to produce for the research.
3. Should you wish, you will receive a copy of the transcription of the interview so you can check and change any information that you have provided.
4. You may, at any time, request the tape recorder to be switched off. You may also refuse to answer any questions during the interview.

With your permission, I would like to follow this letter with a phone call to make an appointment to meet with you at your convenience. If you foresee any difficulties, you may contact me at 011 – 884 1787 or 082 – 375 6574.

Sincerely,

Chaya Herman

Chaya Herman
P.O. Box 650459
Benmore 2010

Date …

Letter of commitment

Thank you for your willingness to assist with my study of the change in Jewish education in South Africa. This study is conducted for the purpose of a PhD degree at the University of Pretoria, the Department of Education Management and Policy Studies led by the Dean of the faculty, Professor Jonathan Jansen. It will be available through the University of Pretoria to study participants and other interested persons.

Your participation is completely voluntary. With your permission, I will make an audiotape of the interview for the purposes of getting the most accurate and completed record.

The study is under the scrutiny of rigorous academic safeguards to ensure discretion and the protection of individual privacy. Therefore:

1. Anonymity and confidentiality will be maintained at all time. Your name will not be mentioned in any other interviews or in the report. You will be identified by code or by position, e.g. principal, teacher.
2. Data (tapes and transcripts) will be analysed by myself, and after being held for a prescribed length of time for reanalysis, will be destroyed. This will apply to any written documents that you will be able to produce for the research.
3. Should you wish, you will receive a copy of the transcription of the interview so you can check and change any information that you have provided.
4. You may, at any time, request the tape recorder to be switched off. You may also refuse to answer any questions during the interview.
5. You may keep a copy of this letter for your records.

Thank you again for your cooperation,
Sincerely,

 Chaya Herman
………………………………………………………………………….……………

I have read the information above and have chosen to participate in this study.

I give my permission for the interview to be tape-recorded.

I would like to receive the interview's transcription: yes / no

Signature: _____   Date: _____

Chaya Herman
P.O. Box 650459
Benmore 2010
(h) 011 884 1787
© 082 375 6574

Date …

Dear

Thank you for your assistance with my doctoral study of the change in Jewish Education in South Africa. I appreciate your willingness to take time out of your schedule for our interview. Your insights about the restructuring are most helpful.

I have enclosed the transcription of our interview. Should you wish to change any information feel free to contact me at any time.

Sincerely,

Chaya Herman

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Glossary[1]

Aliya – Ascent to the Land of Israel. The concept originated when the tribes of Israel journeyed upwards (geographically speaking) to the Land of Israel from low-lying Egypt. It later applied to journeys from any country to Israel, whether for pilgrimage or permanent settlement.

Bat-Mitzvah – Literally, daughter of the commandment. An adult female Jew is obligated to perform the commandments, hence a ceremony on the occasion of a girl's reaching her majority (twelve or thirteen years old). The concept of a ceremony was introduced by the Reform movement in the 19th century and only later begun to appear in some Orthodox circles, but not among the Ultra Orthodox. In the Orthodox tradition the ceremony is held either at home or in a synagogue hall. Usually the *Bat-Mitzvah* ceremony is held for groups of girls at the same time. In Reform temples the girl may read from the *Torah* and address the congregation, similar to that of a boy's *Bar-Mitzvah* ceremony.

Day of Atonement (Yom Kippur) – The most solemn occasion of the Jewish calendar. It is believed that on Yom Kippur the fate of every individual is sealed. An unfavourable decree can be averted by repentance, prayer and charity.

Dinim – Religious laws.

Gemara – The usual designation for the commentary and discussions on the *Mishna*.

Hallacha – A term used to indicate a definitive ruling in any particular area of Jewish law.

Mishna –The Oral law which was compiled circa 200 ce and which serves as the foundation text for Talmudic law and tradition.

Mitnagdim – Literally, the opponents, were those who opposed the *Chassidim*. They were traditional Jews who maintained the aristocracy of *Torah* learning. Their leader was the Gaon Elijah from Villna (*Hag'ra*), and most of his followers were from Lithuania.

Orthodoxy – The modern designation for the traditional section of Jewry that maintains the *Hallachic* way of life based on a divinely ordained *Torah*. The term was first applied in the 19th century by Reform Jews to describe those who remained rigidly faithful to traditional Judaism. Orthodoxy is widely

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[1] Definitions were mostly taken from Werblowsky, R.J. and Wigoder, G. (eds). (1997). *The Oxford Dictionary of the Jewish Religion*, Oxford University Press.

diversified (e.g. *Chassidic* and *Mitnagdim*, Jews following *Ashkenazi* and *Sephardi* rites, etc). All Orthodox Jews are united in their belief in the historical event of revelation at Sinai; in their acceptance of the Devine law in its written and oral forms, and in their acknowledgement of the authority of duly qualified rabbis. Orthodoxy has exhibited reluctance to cooperate with non-Orthodox groups in religious matter, and they do not recognise marriages, divorces and conversions carried out by non-Orthodox rabbis. Orthodox Jews currently constitute a minority among the various Jewish denominations. Most followers are centrist Orthodox (in Israel they are referred to as *Dati.* There are also those who identify themselves as *Masorati* (traditional) and who abide by some of the religious and ritual restrictions but not others. A significant minority is the *Charedim* (mostly *Chassidim* but also from the *Mitnagdim* tradition).

Reform Judaism (Progressive Judaism) – This religious movement advocates the modification of the Orthodox tradition in conforming to the exigencies of contemporary life and thought. The essential difference between Orthodox and Reform revolves around the authority of the *Hallacha*; whereas Orthodoxy maintains the divine authority of the *Hallacha,* Reform Judaism subjects religious laws and customs to human judgement and thus maintains the right to adapt and change Jewish tradition to make it more relevant to each generation. By the 1990s, the Reform movement claimed to be the largest of the Jewish religious movements in North America.

Shtibls – These are small, independent congregations. They are not linked to the main synagogues and cater to the more observant sectors in the community.

Talmud – The *Mishna* together with the *Gemara* comprise the *Talmud*; that is, the collected teachings of the major Jewish scholars who flourished between 200 and 500 ce.

Torah – This term applies both to the entire corpus of sacred literature and to the first section of the Hebrew bible, that is, the *Chummash* or the "Five Books of Moses".

Ultra Orthodoxy (Charedim) – Literally, "God trembling" or "God fearing". This term is commonly reserved for those Orthodox Jews who claim not to make any compromises with contemporary secular culture. The *charedim* are divided into different groups. As they seek to defend traditional Judaism from

erosion they separate themselves from outsiders, especially from secular Jews, and prefer to speak Yiddish. The Ultra Orthodox community strives to expand the scope of *Hallacha* to include the public as well as the private realm. It welcomes the imposition of greater restrictions and hardships. It elaborates on details of the law, such as the modesty of women's dress; women are required to wear sleeves which cover their elbows, while the hemline must cover their knees.

Yeshiva – The oldest institution for higher learning in Judaism, primarily devoted to study of the *Talmud*.