

**HEADS OF DEPARTMENTS EXPERIENCES OF SCHOOL MERGERS IN NORTH
WEST PROVINCE**

by

Maritshi Peter Mpiwa

Submitted in fulfilment of the requirements for the degree

MAGISTER EDUCATION

in the

Department of Education Management and Policy Studies

at the

Faculty of Education

University of Pretoria

Supervisor

Dr Maitumeleng Nthontho

PRETORIA

2020

Declaration of Originality

I, Maritshi Peter Mpiwa (student number 27627137), hereby declare that the mini-dissertation entitled: “**H**eads of departments’ experiences of school mergers in North West province”, for the degree “**M**agister Education” at the University of Pretoria, has not previously been submitted by me for a degree at this or any other university; that this is my own work in design and execution and that all material from published sources contained herein has been duly acknowledged.

Maritshi Peter Mpiwa

11 Feb 2020

Ethics Clearance Certificate



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

Faculty of Education

RESEARCH ETHICS COMMITTEE

CLEARANCE CERTIFICATE	CLEARANCE NUMBER: EM 18/02/13
DEGREE AND PROJECT	MEd Heads of departments experiences of school mergers in North West province
INVESTIGATOR	Mr Peter Mpiwa
DEPARTMENT	Education Management and Policy Studies
APPROVAL TO COMMENCE STUDY	04 May 2018
DATE OF CLEARANCE CERTIFICATE	21 April 2020

CHAIRPERSON OF ETHICS COMMITTEE: Prof Funke Omidire

CC

Ms Bronwynne Swarts
Dr Maitumeleng Nthontho

This Ethics Clearance Certificate should be read in conjunction with the Integrated Declaration Form (D08) which specifies details regarding:

- Compliance with approved research protocol,
- No significant changes,
- Informed consent/assent,
- Adverse experience or undue risk,
- Registered title, and
- Data storage requirements.

Ethics Statement

The ethical standards listed above were adhered to in this dissertation. The ethical considerations upheld in the study are discussed in detail in section 3.9

Language Editor

Alexa Barnby

Language Specialist

Editing, copywriting, indexing, formatting, translation

BA Hons Translation Studies; APEd (SATI) Accredited Professional Text Editor, SATI
Mobile: 071 872 1334
Tel: 012 361 6347

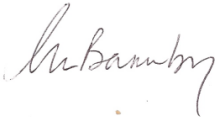
alexabarnby@gmail.com

21 September 2020

To whom it may concern

This is to certify that I, Alexa Kirsten Barnby, an English editor accredited by the South African Translators' Institute, have edited the master's dissertation titled "Heads of departments' experiences of school mergers in North West province" by Maritshi Peter Mpiwa.

The onus is on the author, however, to make the changes and address the comments made.



Dedication

This study is dedicated to my wife, Mrs Maserame Mpiwa, for her outstanding support, care, love, and encouragement. And to my daughters and grandson, Palesa Nthabeleng, Lerato and Letlotlo Mpiwa, the joy of my life. Also to the memory of my late father, Olefile Simon Mpiwa, and my late mother, Gasegame Agnes Mpiwa. May their spirits live on ...

Acknowledgements

I would like to give honour and glory to Almighty God for giving me the wisdom, strength, courage and good health that carried me through this long journey which seemed to be short because of His Great Grace and Mercy.

I express my genuine appreciation to my wife, my daughters and my grandson for their love, support, understanding and care that sustained me going throughout this study.

My sincere gratitude and appreciation are directed to Dr Maitumeleng Nthontho, my supervisor. I am deeply indebted to her for her persistent professional support, guidance, inspiration and encouragement throughout this research project. I am deeply grateful to her for scholarly ability and diligence, and her interest in my growth as a scholar.

An immense “thank you” is extended to all the HoDs who participated in this study for their time and meaningful contributions that shaped the study and also to all the principals and SGBs, who allowed me to conduct research in their schools.

My heartfelt thanks go to the Superintendent General North West Department of Education for affording me permission to use schools in the study for the purposes of data collection.

A final word of thanks for the motivation and support I received from my acquaintances – Drs Peter Makgwana, Shadrack Mvula, Andries Phorabatho and Jennifer Mosepele and to Mr Theophilus Moyo and Mr Ndangariro Mpofo for their constant words of encouragement and peer support.

Abstract

Although there has been much research on school mergers, there has not been a strong focus on the way in which heads of departments (hereafter HoDs) in the North West province experience school mergers. This qualitative case study, which used an interpretative paradigm, built on and contributed to understanding successful strategies used by displaced HoDs from middle to primary or secondary schools in performing their roles and responsibilities after the school mergers, the challenges they experienced and how they approached such challenges. Semi-structured interviews and a document analysis with purposive sampling of nine (9) participants, comprising six (6) female HoDs and six (3) male HoDs, were used to collect the requisite data. The study was underpinned by a conceptual framework, to identify and construct my views as a researcher, on the HoDs experiences of school mergers in North West province (Adom, Hussein & Agyem, 2018) as a lens for data analysis. The study findings indicated that there had been a significant change in the roles and responsibilities performed by the displaced HoDs. The HoDs had also demonstrated resistance to the school mergers as they had not been prepared for handling tensions and opposition (Pinheiro, Geschwind & Aarrevaara, 2016). It was also found that the HoDs had different understandings and interpretations of the concept of a school merger, and that the NWDoE had undermined them and had also not prepared them adequately enough for both the school merged and to cope in their new roles. The findings also indicated that the NWDoE had done very little to involve the HoDs in the entire school merger process. In addition, the findings also revealed that generally teaching and administering curriculum was a challenge for some of the expatriate HoDs due content gap in the subject areas allocated to them in their new roles. Accordingly, the study pointed out the need for retraining and workshopping the displaced HoDs, as well as placement in line with their areas of specialisation and proficiency. It was hoped that this might help them to handle the tensions they were experiencing and to decrease their opposition, diminish their resistance and, finally, assist them in performing their hugely changed roles and responsibilities in their new schools.

Keywords: School merger; primary school; middle school; secondary school

Abbreviations

ATP – Annual Teaching Plan

CRSA – The Constitution of the Republic of South Africa

DoE – Department of Education

EEA – Employment of Educators Act

ELRC – Education Labour Relation Council

FAL – First Additional Language

FET – Further Education and Training

GET – General Education and Training

HoDs – Heads of Departments

NMM – Ngaka Modiri Molema

NWDoE – North West Department of Education

PPM – Personnel Administrative Measures

RRMUNSI – Regulations Relating to Minimum Uniform Norms and School Infrastructure

SASA – South African Schools Act of 1996 (Act No. 84 of 1996)

SMT – School Management Team

Table of Contents

Declaration of Originality	i
Ethics Clearance Certificate	ii
Ethics Statement	iii
Language Editor	iv
Dedication	v
Acknowledgements	vi
Abstract	vii
Abbreviations	viii
CHAPTER 1 INTRODUCTION: RESEARCH PROBLEM AND METHOD	1
1.1 Introduction and background	1
1.2 Problem statement.....	3
1.3 Statement of purpose.....	5
1.4 Research questions.....	5
1.4.1 Primary research question.....	5
1.4.2 Secondary research questions.....	5
1.5 Rationale for the study	5
1.6 Literature review	6
1.6.1 School merger	6
1.6.2 HoDs' experiences of school mergers	7
1.6.3 The effects of merger.....	8
1.7 Conceptual framework.....	9
1.7.1 The primary challenges.....	10
1.7.1.1 The superordinate school	11
1.7.1.2 The basic skills and capacities of the HoD: professional identity.....	11
1.7.1.3 The human relations movement	11
1.7.2 The secondary challenges	12
1.7.2.1 Identity change	12
1.7.2.2 Teaching and administration	12
1.7.2.3 Defined transformation process.....	13
1.8 Research methodology.....	13
1.8.1 Qualitative research approach	13
1.8.2 Research design	15
1.8.3 Sampling and sampling techniques.....	15

1.8.4 Data collection and interpretation.....	16
1.9 Data analysis	17
1.10 Conclusion	17
CHAPTER 2 LITERATURE REVIEW	18
2.1 Introduction.....	18
2.2 Definition of merger	18
2.3 School merger	20
2.3.1 International perceptions and some lessons from school mergers	20
2.3.2 The South African setting for higher education mergers	23
2.3.3 The South African setting of school mergers	25
2.4 Reasons for a school merger	27
2.5 HoD experiences of school mergers	28
2.6 The effects of mergers	29
2.7 Conceptual framework.....	32
2.7.1 The primary challenges.....	34
2.7.1.1 The superordinate school.....	34
2.7.1.2 The basic skills and capacity of the HoD – Professional identity.....	34
2.7.1.3 The human relations movement	35
2.7.2 The secondary challenges	35
2.7.2.1 Identity change	35
2.7.2.2 Teaching and administration	36
2.7.2.3 Defined transformation process.....	36
2.8 Conclusion	36
CHAPTER 3 RESEARCH METHODOLOGY	37
3.1 Introduction.....	37
3.2 Qualitative research methodology	38
3.3 Research Paradigm.....	38
3.4 Selection of participants and design.....	39
3.4.1 Setting	40
3.4.1.1 Background of the HoDs	40
3.4.1.2 The HoDs in the North West province	41
3.4.2 Participants.....	41
3.5 Instrumentation	43
3.5.1 Role of the researcher	43

3.5.2 <i>Semi-structured interview</i>	44
3.6 Data collection	45
3.7 Data analysis	45
3.8 The trustworthiness of the study	46
3.8.1 <i>Credibility of the study</i>	46
3.8.2 <i>Dependability</i>	46
3.9 Limitation.....	47
3.10 Ethical considerations	47
3.11 Conclusion	48
CHAPTER 4 _RESEARCH FINDINGS	49
4.1 Introduction.....	49
4.2 Data analysis process	52
4.3 Interview analysis	53
4.3.1 Definition of and reasons for school mergers	53
4.3.2 <i>Role HoDs played in the school merger process</i>	56
4.3.3 <i>The effects of school merger on the HOD role</i>	58
4.3.4 <i>Challenges HoDs experienced in performing their roles after displacement</i>	61
4.3.5 <i>Support for the HoDs to enable them to cope with displacement</i>	65
4.4. Document analysis	69
4.4.1 <i>School mergers and reasons for the school mergers</i>	70
4.4.2 <i>Role played by HoDs</i>	70
4.4.3 <i>Support given to HoDs</i>	70
4.4.4 <i>Minutes of the SMTs and task team</i>	71
4.5. Conclusion	71
CHAPTER 5 _CONCLUSION AND RECOMMENDATIONS	74
5.1 Introduction.....	74
5.2 Discussion.....	75
5.2.1 <i>School merger as defined by the HoDs</i>	75
5.2.1.1 <i>Absorption of middle schools into primary and secondary schools</i>	75
5.2.1.2 <i>Displacement of HoDs from one school to another</i>	76
5.2.1.3 <i>HoDs changing positions</i>	77
5.2.2 <i>Involvement of the HoDs in the school merger process</i>	78
5.2.2.1 <i>Short-lived, “smash and grab” type of preparations</i>	78
5.2.2.2 <i>Undocumented role played by HoDs</i>	78

5.2.2.3 Appalling transition when upgrading to secondary schools	79
5.2.2.4 Refusal to upgrade to secondary schools.....	79
5.2.3 Impact of school mergers on HoDs' roles	80
5.2.3.1 Despondency among the displaced HoDs	80
5.2.3.2 Principal responsible for the school merger.....	80
5.2.3.3 Counselling of displaced HoDs	81
5.2.3.4 Assumption that HoDs from middle schools could be HoDs in either primary or secondary schools.	81
5.2.4 Challenges faced by displaced HoDs in performing their roles	82
5.2.4.1 Leading and teaching subjects for which they were not qualified.....	82
5.2.4.2 Content gap.....	83
5.2.4.3 Notional time and coverage of syllabi (GET and FET)	83
5.2.4.4 Neglect of lower grades	84
5.2.4.5 Changed workloads, roles and responsibilities	84
5.2.5 The support given to displaced HoDs to enable them to cope	86
5.2.5.1 Unwelcoming behaviour	86
5.2.5.2 Unpleasant transitions when upgrading to secondary schools.	86
5.2.5.3 Lack of professional development.....	87
5.3 Recommendations and conclusions	87
5.3.1 Recommendation 1: Resources	87
5.3.2 Recommendation 2: Preparation, welcoming/receiving and support.....	87
5.3.3 Recommendation 3: Placement.....	88
5.3.4 Recommendation 4: Workload, roles and responsibilities	88
5.3.5 Recommendation 5: New school	88
5.4 Recommendations for further research	88
REFERENCES.....	89
ANNEXURES.....	97
ANNEXURE A: LETTER TO THE SUPERINTENDENT GENERAL.....	97
ANNEXURE B: APPROVAL LETTER FROM DEPARTMENT OF EDUCATION	99
ANNEXURE C: ETHICS CLEARANCE CERTIFICATE, UNIVERSITY OF PRETORIA	100
ANNEXURE D: LETTER TO PRINCIPALS AND SCHOOL GOVERNING BODIES.....	101
ANNEXURE E: PERMISSIONS FROM SCHOOLS	103
ANNEXURE F: INTERVIEW SCHEDULE	107
ANNEXURE F: INTERVIEW SCHEDULE	Error! Bookmark not defined.6

List of Figures and Tables:

Figure 1: Representation of the conceptual framework of the study33
Table 4.1: Introducing the research participants.....52

CHAPTER 1

INTRODUCTION: RESEARCH PROBLEM AND METHOD

1.1 Introduction and background

The changes wrought by the April 1994 elections in South Africa resulted in, among others, the reconstruction of the education system with school mergers being one of the outcomes of such reconstruction. Among the Acts passed was the South African Schools Act of 1996 (Act No. 84 of 1996) that provides for the merger of public schools (section 12A). The Regulations Relating to Minimum Uniform Norms and School Infrastructure have created a clear legal position as to what constitutes a small or large school. Regulation 5(3)(ii) provides that a small primary school should consist of a minimum capacity of 135 learners while regulation 5(3)(i) provides that a small secondary school should consist of a minimum capacity of 200 learners. It is important also to point out that the school merger is not limited to the rural and farming communities as it may also occur in urban communities, thus rendering collective effort to improve the quality of education, to expedite the resourcing of schools, to promote access to schools as a result of their reclassification (Ministerial Committee on Rural Education, 2005).

In recent years there has been an increased interest in school mergers in South Africa and elsewhere. Due to increased urbanisation many local policymakers and school administrators are having to confront shrinking student numbers in their municipalities and schools (De Haan, Leuven & Oosterbeek, 2016). They are then faced the question as to whether or not to continue operating the resultant small schools or to merge several small schools into one larger school. According to De Haan et al. (2016), there are potential advantages and disadvantages to small school populations and the merging of schools. For example, operating several small schools ensures that students have a wider choice of schools to choose from and may, in fact, improve competition between schools. The aim of merging schools may be to consolidate educational resources. However, ideal school merger decisions require a knowledge of the effects of such decisions on student outcomes. Nevertheless, this is not always the case. Botha (2001) argues that the lack of a clearly defined transformation process is one of the most common problems in mergers. She also contends that the “role, behaviour and ability of management often distract from how well employees cope with change” (Botha, 2001:276).

Globally, school mergers appear to be an attractive measure for solving several problems and challenges. In Norway, school mergers are seen as a solution to problems such as fragmentation, small institutions (decline in the enrolment of learners), challenges relating to the cost effectiveness of maintaining such schools, confronting external threats and the non-performance of schools (Pinheiro et al., 2016; Skodvin, 2014; Harman & Harman 2003). States often calculate their costs (including personnel costs) based on learner numbers, with a reduction in learner numbers often contributing to problems in relation to establishing staff numbers and curriculum provisioning (De Haan et al., 2016; Liu et al., 2010; DoE, 2009:3). However, various researchers have highlighted that merging the schools does not necessarily either improve schools or lead to better academic results (Brasington, 1997). Instead, the merged schools are likely to differ from those that have not been merged (De Haan et al., 2016). In other words, the majority of these mergers do not fulfil the original expectations (Boen, Vanbeselaere & Cool, 2006).

Nonetheless, studies have also cited some gains resulting from the merging of schools. Skodvin (1999) mentions that merging small or non-viable schools into larger schools may result in economic efficiency. According to Skodvin (1999), the merger of schools should aim to improve the quality of education, expedite the resourcing of schools, promote access to schools and ensure the retention of learners and educators in rural and farm schools (De Haan et al., 2016; Liu et al., 2010; DoE, 2009). Although relevant literature is explicit about the adversities and privileges that accompany school mergers there is, however, little said about how the people whose lives depend on the stability of these schools are affected by school mergers.

South Africa is no exception to the reality of the educational reforms that speak to school mergers. According to the Department of Education (hereafter DoE) (2009), school mergers are initiated by the provincial education departments which set both the structure for and the timeframe in which the mergers are to take place. Statistics indicate that ninety-seven schools in North West were merged from 2009 to 2015 (NWDoe, 2016). Statistics further indicate that the phase 3 school mergers from 2014 to 2015 had been in process but were placed under a moratorium. In the North West province school mergers involved middle schools, thus ignoring the problem of non-viability, dysfunctionality and general inefficiencies caused by the prevailing schooling landscape (DoE, 2012–2016:4).

The majority of the mergers recommended by the DoE reveal that middle schools are often merged with either primary or high schools. As a result, some of the heads of departments (hereafter HoDs) who served in middle schools are placed in primary schools while other HoDs from the same schools are placed in secondary schools based on departmental needs and not necessarily on the qualifications of the educators. In view of the fact that HoDs perform the role and responsibilities of middle management to ensure effective teaching and learning, their ability to manage their departments is crucial (Urio, 2012). There is limited literature on the knowledge and experience of the HoDs regarding their new roles and responsibilities after mergers. However, the researcher in this study argues that the HoDs' understanding and interpretation of the change process that took place both during and after the merger play a significant role in their successful performance of their roles in the new school setting.

Research (De Haan et al., 2016; DoE, 2014; Liu et al., 2010) evidence suggests the need to determine the support required by both learners and educators when they move from small, rural and farm schools to larger, as schools merges. It is therefore, against this background that this research study sought to get an understanding of the effective strategies used by the HoDs in presenting their roles and responsibilities after the school mergers, the challenges they experienced and how they handled such challenges. The researcher aimed to investigate how the former middle school HoDs experienced school mergers in the North West province.

1.2 Problem statement

A streamlined system of schooling in public ordinary school should be systematically maintained with eight years of primary schooling (Grades R–7) and five years of secondary (Grades 8–12). Based on this stipulation, the rationalisation process that would lead to the mergers of some schools becomes necessary. According to the North West Provincial Department of Education (2012–2016:3), school mergers constitute a process by means of which primary and secondary schooling system is achieved from an existing primary, middle and high school system. At the time of the study it was the intention of the department to use the school merger process to align the schooling landscape in the North West province with the national schooling system, which comprises primary and secondary schools.

Schools differ according to the district and even the offices (De Haan et al., 2016) with schools in the North West province being no exception to this reality. The schooling system in the North West province comprises different types of schools, including middle schools, which are a unique feature in the schooling landscape. Inherited from the former Bophuthatswana, middle school grades overlap between the traditional primary and high schools (NWDoe, 2016). The intention of the DoE to align the schooling landscape in the province first became obvious with the publication of a Government Gazette on school mergers in 2007 (DoE, 2012–2016:4). At the time of this study, in relation to the types of schools in the province, the education landscape still carried with it the remnants of the legacy inherited from the past dispensation (NWDoe, 2015).

The merging of schools from the three types of schools (primary, middle and high) to two (primary and secondary) types in the schooling system has left many HoDs displaced. Some middle school HoDs have found themselves attached to either primary or secondary schools, depending on the need of the department. Although this displacement affected the entire school system in the province, the HoDs from the middle schools were the most severely affected. The problem lay with the curriculum of the new schools. Most these HoDs had worked in middle schools since the beginning of their teaching careers and, without prior psychological preparation, they were expected to teach and manage a curriculum for which many of them were not qualified. This created serious challenges for them and for the school system in general with the danger being that the skill requirements of the new establishment may not have matched the skills profile of the incumbent HoDs.

According to Skodvin (2014), school mergers are not an easy or a smooth process. The underperformance of schools that have undergone a merger may be partly attributed to resistance on the part of the HoDs to be identify with the transformed schools (Boen et al., 2006). Overall, it would seem that the challenges associated with mergers are mainly fear, stress and tensions and, thus, school mergers very rarely occur without some resistance. School principals should, therefore, be prepared for handling tensions and opposition. Goedegebuure (2012) and Pinheiro et al. (2016) suggest that it is incumbent on policy makers to pay careful attention to factors such as the leadership challenges related to merger, the role of principals, staff attitudes to the merger, cultural factors and external pressures in favour of the merger. In this study, the researcher aimed to discover how former middle school HoDs in primary and secondary schools in the North West

had experienced school mergers. In order to advance an understanding of the effective strategies used by the HoDs in doing their roles and responsibilities after the school mergers, the challenges they experienced and how they handled such challenges.

1.3 Statement of purpose

The purpose of the study was to explore how HoDs in the North West province experienced school mergers. The researcher intended to gain an understanding of the successful strategies used by the HoDs in performing their roles and responsibilities after the school mergers, the challenges they experienced and how they approached such challenges.

1.4 Research questions

1.4.1 Primary research question

How do HoDs in the North West experience school mergers?

1.4.2 Secondary research questions

- 1.4.2.1 What do you understand by the concept school merger and the reasons for school mergers?
- 1.4.2.2 What role did the HoDs play in the school merger process?
- 1.4.2.3 How have school mergers affected the role of HoDs?
- 1.4.2.4 What challenges do HoDs experience in performing their roles after their displacement?
- 1.4.2.5 What support do the HoDs receive to enable them to cope with such displacement?

1.5 Rationale for the study

The study was partially informed by the researcher's experience as a school principal in a secondary school in the North West province. In 2010 an HoD from a middle school that had been merged with a high school joined the school. The narratives of the said HoD revealed that the HoD was struggling to cope with and perform the expected role and responsibilities of the new HoD position given that she was qualified to teach in a primary school. Procedurally, HoDs become subject heads who assist educators with subjects that are not of the educators' specialty. Although

this HoD would be of benefit to the school, the fact that she was qualified for a primary school had meant she would not be of much benefit to the department assigned to her. In other words, she was underqualified for the school level to which she was assigned and there was nobody to mentor her.

In common with any educator in the school, the main aim of the HoD is to respect, promote, protect and fulfil the rights and freedoms of both learners and parents, including learners' right to quality education (The Constitution of the Republic of South Africa, 1996). In response to this call, the HoDs do a great deal of work in managing the teaching-learning process that operates at the middle management level in schools (Fleming & Amesbury, 2012). They have an administrative role within the school, as well as a teaching responsibility. They actively assist the principal of the school in ensuring good professional practice standards and the quality of teaching and learning (Lee & Chiu, 2017). They are also responsible for co-ordinating the teaching and learning of the subject for which they are responsible as well as setting and moderating examination papers (Lee & Chiu, 2017). In short, described above are the roles and responsibilities of the HoDs in schools.

In order to perform their duties, the HoDs must be protected and supported. In other words, their labour rights must be respected, promoted, protected and fulfilled (The Constitution of the Republic of South Africa, 1996). A failure to adhere to these measures may mean that any educational process that adversely affects them psychologically and socially will automatically have a negative impact on their network role. When considering the manner at which school mergers were dealt with in the North West province, the researcher started to wonder whether the right of the learners, parents and/or HoDs were ever considered. It was for these reason that the researcher wished to acquire an understanding of the HoDs' experiences of school mergers.

1.6 Literature review

1.6.1 School merger

It was deemed essential to understand what a merger is and who initiates it. According to Botha (2001), a merger refers to an amalgamation of two or more firms, in which the resulting firm maintains the identity of one of the firms, usually the larger one. Liu et al. (2010) define a merger as the most extreme form of an inter-institutional organisational solution and as an 'irreversible totality – the legal death of one or both parties in the creation of a new one'. Viewing it within the

educational context, Skodvin (1999) describes school mergers as a process whereby two or more previously separate institutions are joined together into one new single institution which stresses and denotes radical change with not only management but also the ‘souls’ of the partners also being affected. The institutional changes include departing the existing forms of authority, changes in institutional norms, objectives and academic programmes as well as the alteration of organisational procedures. Many researchers have described these changes as both drastic and dramatic (Duncombe & Yinger, 2007; Skodvin, 1999). It was for transformation purposes that the South Africa higher education system experienced institutional merger during the period 2001 to 2007 when the higher education system was undergoing a restructuring process with universities, technikons and colleges being merged (Arnolds, Stofile & Lillah, 2013). Research has found that the impact of mergers on staff has been devastating for both the emotional and professional lives of all staff members at all levels (Jansen, 2003). Arnolds et al. (2013) are of the opinion that human resource issues are one of the reasons why some of the mergers which have taken place in higher education in South Africa have not been successful.

There are three types of institutional mergers, namely, friendly, voluntary and forced mergers. According to Botha (2001), the first type of merger, the friendly merger, results from an agreement between the management of two firms that the two firms be combined into one. Botha (2001) goes on to define a friendly merger as a merger transaction which is endorsed by the target firm’s management, approved by its stockholders and concluded without complications. When choosing a merger partner, one of the key criteria would be the compatibility of the cultures of the prospective partners. Skodvin (1999) describes the voluntary merger as a merger which takes place when the institutions themselves have initiated the merger as a result of consensus that the two firms are worth more together than the sum of the two firms separately and that, by merging, the combined firm will benefit from the synergy arising from the merger (Botha, 2001; Skodvin, 1999). Skodvin (1999) describes the third type of merger as a forced merger. In a forced merger the initiator of the merger is external to the institutions concerned. The merger of schools in the North West province may be seen as a forced merger.

1.6.2 HoDs’ experiences of school mergers

According to Urio (2012), HoDs in schools may be defined as the people whose roles place them between the school management team (SMT) and their colleagues and whose job description does

not extend beyond the normal teaching and pastoral functions. Thus, HoDs are simultaneously leaders, managers and administrators. Quality education depends primarily on the way in which schools are managed and the capacity of the schools to improve teaching and learning. Sound leadership is, therefore, needed to enable the adoption of bold measures to address the challenges of improving the quality of the teachers and their effectiveness in schools (Fleming & Amesbury, 2012).

The challenges which HoDs experience as a result of mergers include fear, stress and tensions. According to Goedegebuure (2012) and Pinheiro et al. (2016), there is usually resistance to a merger on the part of HoDs and the principal should, therefore, be prepared for handling the tensions and opposition. The resistance which the HoDs experience arises from professional disagreements, fear of the unknown, loss of identity, loss of personal goods, loss of social relations, additional work and new responsibilities, changes in power relations and changes in social environments, etc. (Jacobsen, 2012).

1.6.3 The effects of merger

The implementation of school mergers in South Africa and elsewhere is generally fraught with conflicts and tensions. Research suggests that schools that merge are likely to differ from schools which have not undergone a merger (De Haan et al., 2016). Unfortunately, most of these mergers and acquisitions do not meet the expectations which were set at the start of the process. Botha (2001) cites the lack of a clearly defined transformation process as one of the most common problems in mergers. She also contends that the role, behaviour and aptitude of management often impacts on the way in which well employees cope with change. Price (1999) suggests that executives involved in mergers and acquisitions usually ignore the issues of culture, values, behaviour and working styles which should, however, be carefully managed from the very outset of the process.

After the extensive review of both local and international literature, the researcher acknowledged that there is a considerable volume of work which has been conducted on school mergers. Boen et al. (2006) conducted a study on the relationship between the perceived status of an organisation after a takeover. The study focused on the employees' identification with the new organisation. The study involved a quantitative question being posed to a sample of approximately 234

employees of a corrugated board producing company which had taken over a smaller company eight months before the study. Using an instrumental variable strategy the effects on student achievement of the consolidation reform of large schools in Dutch primary education were investigated. It was found that, in general, the school consolidation led to improved student achievement (De Haan et al., 2016; Liu et al., 2010). Duncombe and Yinger (2007) and Skodvin (1999) are also of the opinion that the consolidation of organisations or institutions makes fiscal sense. A qualitative case study research aimed at assessing and interpreting the merger process between two public secondary schools in the Norwegian educational sector has been conducted while a qualitative study examining the emotional experiences of teachers during the national curriculum reform of senior secondary education in China has been carried out.

This study aimed to differ from other studies which have been conducted as the focus of this study was on addressing the evident gap in research by exploring on the understanding of the effective strategies used by the HoDs in doing their roles and responsibilities after school mergers on HoDs who are moved to a level for which they lack the knowledge and skills required to perform their expected roles and responsibilities. It was also felt that the study findings on the experiences of former middle school HoDs in relation to school mergers would contribute to the existing body of limited research on school mergers in South Africa. In view of the naturalistic and interpretive mindset underpinning qualitative research it was decided to use the qualitative approach in the study. HoDs were selected as the participants in the study and they were expected to share their everyday experiences and perceptions of school merger with the researcher (Denzin & Lincoln, 2003). The study involved six schools (one primary and five secondary) only from which nine participants, i.e. HoDs, were purposively selected. The researcher intended to interact with the participants and listen to accounts of their perspectives of the research topic during one-on-one semi-structured interviews (Tashakkori & Teddlie, 2003). Open questions were posed during the interviews to generate rich data.

1.7 Conceptual framework

A conceptual framework is a reliable and inclusive framework that encompasses the research question(s) and framing hypothesis or which makes informal, tentative predictions about the possible outcome of a study (Tashakkori & Teddlie, 2003). Adom et al. (2018) argue that a

conceptual framework is used in research in order either to outline choices or to demonstrate a favoured approach to a thought or an idea. In addition, it may also act like a map by providing coherence for an empirical inquiry. To plan the preferred approach, concepts related to the topic are used to create a framework for research in order to design the data collection instruments and also a framework for understanding, analysing and explaining the data which has been collected (Tashakkori & Teddlie, 2003). According to Maxwell (2005:35), a conceptual framework is constructed, not found, while the coherence of the framework is built – it is not something that exists readymade. There are four possible sources from which to derive a conceptual framework, namely:

- the researcher's own experiences and knowledge
- existing theory and research
- exploratory research, and
- thought experiments.

The conceptual framework used in this study comprised two sections. The first section detailed the following three major issues which impact directly on displaced HoDs, namely, the superordinate schools; the basic skills and capacities of HoDs; and the human relations movement in order to discover HoDs' satisfaction, wellbeing and workplace efficiency. These issues were referred to in the conceptual framework as the primary or major challenges because they formed the basis of the entire study, i.e. they encompassed the issues that had prompted the researcher to engage in this study, namely, the challenges experienced by HoDs in middle schools as a result of the merging of schools in the North West province. The second section of the conceptual framework provided an overview of four variables, as suggested by the literature, namely, identity change; teaching, administration and a defined transformation process. These issues were referred to as secondary challenges because, while their purpose was to address school mergers, there was no compatibility between them and the displacement of HoDs. Nevertheless, these variables always pose a challenge to the HoDs in merged schools.

1.7.1 The primary challenges

The merging of middle schools with primary or high schools in the North West province resulted in HoDs being placed in either primary or secondary schools but without their having any say in the matter. This movement of HoDs from the former middle schools to levels at which they were

not qualified to teach and to manage the curriculum signified the displacement of HoDs. The reinstatement of a culture of teaching and learning; coping with limited resources and ensuring accountability all become problematic in such situations (Naicker & Mestry, 2013). The following three major challenges in relation to the displacement of HoDs were identified in the literature review are discussed below.

1.7.1.1 The superordinate school

A school merger refers to the amalgamation of two or more schools with resulting school retaining the identity of one of the schools, usually the larger one. The resulting school is known as the new superordinate school (Botha, 2001). Two different, distinct school groups form one common, in-group and develop a new identity over time. Furthermore, new relationships, different cultures and social life changes emerge (Terry & McKimmie, 2016). In addition, school mergers involve the imposition of HoDs on the new superordinate school. In relation to the situation in the North West province, former middle school HoDs were displaced from the middle schools and dispatched to either primary or high schools which then constituted the new superordinate schools.

1.7.1.2 The basic skills and capacities of the HoD: professional identity

School mergers in the form of education changes require the creation of a new culture of teaching and learning as well as the improvement and maintenance of high standard of education. The movement from the former middle schools to either primary or secondary schools brings out changes in the roles of HODs and as well as numerous expectations of them. According to Lee and Yin (2011), HoDs' professional identity reflects the way in which HoDs, as practitioners, view themselves and others as HoDs. It is a construct of the professional self that evolves over career stages (Lee & Yin, 2011) and defines the "social and policy expectations of what a good HoD is, and the educational ideals of the HoD" with such a professional identity being shaped by schools, reforms, and political contexts (Day & Kington 2008).

1.7.1.3 The human relations movement

The human relation movement argues that HoDs respond primarily to the social context of the workplace, including social conditioning, group norms and interpersonal dynamics (Sarker & Khan, 2013). However, school mergers generally overlook the satisfaction of the HoDs' basic needs as the key to increasing learner productivity. It has now been widely acknowledged that

school mergers may have many adverse effects on HoDs' wellbeing and behaviour, including high levels of stress, lowered job satisfaction, and reduced, new superordinate school identification (Cartwright & Cooper, 1993).

1.7.2 The secondary challenges

The movement of former middle school HoDs to the levels for which they were not qualified has created a content gap/lack of curriculum knowledge. The roles and responsibilities of those HoDs who have been displaced have become a challenge. The implementation of a forced school merger may damage the "new school" environment in relation to the many basic roles and responsibilities of HoDs as opposed to a friendly and voluntary school merger as reported by Botha (2001) and Skodvin (1999) in a related study. There is agreement between the management, stakeholders of merging schools with the DoE. In order to answer the secondary research questions, three secondary challenges in relation to the displacement of HoDs that were identified in the literature review are discussed below

1.7.2.1 Identity change

The merger of middle schools with primary or high schools to form new superordinate schools force the HoDs involved to change their identities drastically (Duncombe & Yinger, 2007; Skodvin, 1999). Their 'souls' may be said to be affected, i.e. their depths of understanding pertaining to the middle school setup is abruptly changed. The HoDs' personalities, emotions and passion would have been shaped in the atmosphere of the middle schools over the years (Cartwright & Cooper, 1993). The majority of the HoDs from these former middle schools in the North West province had had more than fifteen years of experience and relocating them resulted in their being moved out of their comfort zones.

1.7.2.2 Teaching and administration

The former middle school HoDs' teaching and administration of the curriculum was performed involuntarily (enforced) in the new superordinate schools irrespective of their qualifications or sense of comfort with their roles and responsibilities (Amiot, Terry & McKimmie, 2012). This set the tone of engagement within this study because the work of displaced HoDs included managing the curriculum, instruction and monitoring and providing feedback on the teaching and learning

(Goedegebuure, 2012; Pinheiro et al., 2016). The right qualification for right correct level is essential in relation to HODs teaching and administering the curriculum. The changes they experienced include their having to leave existing forms of authority, middle school norms and cultures, objectives and curriculum programmes as well as facing alterations in school procedures (Cartwright & Cooper, 1993).

1.7.2.3 Defined transformation process

The lack of a clearly defined transformation process is one of the most common problems in the failure of school mergers. The role, behaviour and ability of SMTs as well as circuit and district levels involved identifying and classifying all HoDs from former middle schools in line with primary and secondary schools (De Haan et al., 2016; Liu et al., 2010). It is imperative that the issues of culture, values, behaviour and working styles are carefully managed from the very outset of the process. Having presented the framework on which the proposed study was based, the following section discusses the research methodology and the methods used in the study.

1.8 Research methodology

According to Denzin and Lincoln (2003), the research methodology used orders the type of research tools and research designs to be used in a study. Thus, in this section, the researcher describes the design of the study, including the description of the site, data collection methods, the time and length of the study, the number of participants and how they were selected. The next subsection discusses the research approach in the study, namely, a qualitative research approach.

1.8.1 Qualitative research approach

This study explored how HoDs in the North West province had experienced school mergers. In investigating this phenomenon, qualitative research approach was used to gather the experiences of the participants. A qualitative approach is a naturalistic, interpretative approach which is concerned with understanding the meanings which people attach to actions, decisions, beliefs and values within their social world. It is distinguished by its “ability to represent the views and perspectives” of the participants and to hear their voices (Lee & Yin, 2011). Qualitative research is based on an anti-positivistic approach. It is exploratory and aims to understand people’s views

of their world (Paulsen, 2009). The qualitative research approach, therefore, allows the researcher to study a small sample and to ask open-ended questions (Tashakkori & Teddlie, 2003).

The focus of this study was on understanding the way in which HoDs experience school mergers. The qualitative approach was selected because it has the advantage of offering an in-depth understanding of underlying reasons and motivations (Lee & Yin, 2011). In addition, it has the advantage of allowing face-to-face interactions with the participants and providing insights into what is being researched by allowing the exploration of attitudes, behaviour and experiences (Murchison, 2010). The qualitative research approach enables the participants to be studied in their natural setting in order to make sense of the meanings they attach to the phenomenon in question. The requisite data was generated through semi-structured interviews and document analysis which were conducted with the HoDs. It must, however, be noted that potential challenges that may be faced when collecting the data included bias due to reliance on self-reporting by the participants. Thus, there may be inaccuracies due to a poor recall of events and also reflexivity with the interviewees giving what the interviewer wants to hear. Nevertheless, to order to overcome this challenge, a document analysis was used as an additional data source to obtain to triangulate with the data from the interviews (Bowen, 2009).

Guba (1990) points out that research paradigms may be characterised through their ontology (What is reality?), epistemology (How do I know something?) and methodology (How do I go about finding it out?) The ontology underpinning this this study suggested that there is no single reality or truth about the merger of schools with individuals in groups (less realist), for example, HODs, create reality. The paradigm used was interpretive because the researcher intended to make meaning of the experiences of the participants. Epistemology is concerned with how knowledge is constructed (Cohen, Manion & Morrison, 2011). In this study the knowledge and experiences of HoDs in relation to school mergers were generated through making sense of the experiences, and activities of the HoDs and the events to which they had been subjected after the school mergers in the North West province. Thus, the study was directed within the interpretive paradigm, which accepts that knowledge may be constructed and that there are multiple realities that may be determined from the given situation. Through this paradigm, the research ascertained different perspectives and different realities of the HoDs regarding their experience of school mergers. This paradigm enabled the data to be interpreted from the perspective of both HoDs and the researcher.

1.8.2 Research design

Mouton (as cited in Paulsen, 2009) states that a research design is a plan or blueprint of what the researcher intends to do when conducting a research study. McMillan and Schumacher (2010) add that a research design is a plan for selecting subjects, research sites and data collecting procedures to answer the research question(s). Thus, based on the above, it may be said that the research design provides a clear guideline of what the researcher must do in order to answer the research question(s). This study used a case study research design. A case study allows the researcher to work within a bounded context, namely, in this study in the bounded context of six schools in the NMM district in the North West province (Creswell, 2012). According to Golafshani (2003), case studies are “fixed in real life and can offer richly comprehensive account of phenomena”. The case study made it possible for the study to be conducted in school contexts and the interviews to be conducted in natural setting.

1.8.3 Sampling and sampling techniques

Sampling refers to the process which is used to select a portion of the given population for a study (Johnson & Christensen, 2008:247). Robbins (2009:84) asserts that a properly selected sample will, in all likelihood, lead to an accurate representation of the population being studied. Purposive sampling was used for the purposes of this study to select the participants. Purposive sampling techniques have also been referred to as nonprobability sampling, purposeful sampling or qualitative sampling. Purposive sampling techniques involve selecting certain cases that have the potential to produce data that will answer the research questions (Tashakkori & Teddlie, 2003). According to Bernard (2002), the purposive sampling technique, also known as judgement sampling, refers to the deliberate choice of a participant based on the qualities the participant possesses. In other words, the researcher decides what needs to be known and sets out to find people who are able and willing to provide the information required on the basis of their knowledge and/or experience.

The study was conducted in the NMM district in the North West Province. Mahikeng is a mixture of semi-rural areas, townships and urban areas under the Mahikeng municipality. The socio-economic conditions vary from extremely poor to middle class. There are 145 public schools in the subdistrict which include 41 are secondary schools, two combined schools and 102 primary schools. Due to the nature of the limited scope of this dissertation, the study involved one primary

school and five secondary schools which, at the time of the study, were superordinate schools. These superordinate schools had resulted from the mergers of middle schools with primary or high schools and the shutting down of the middle schools. HoDs from the former middle schools had been deployed to these superordinate schools and were then sampled for the purpose of this study. Nine participants were then selected from this population.

1.8.4 Data collection and interpretation

Data collection in qualitative research involves the use of multiple forms of data such as observations, interviews, objects, written documents, audio-visual materials and electronic documents (Leedy & Ormrod, 2010). In this study semi-structured interviews were used to collect the requisite data. Semi-structured interviews enable the researcher to gather the experiences, opinions and feelings of the participants (Merriam, 2005). Merriam (2005) further states that the purpose of semi-structured interviews is to find out what is on the interviewees' minds with the interviewees being able to share their thoughts, experiences and views so that a clear picture of the event or phenomenon in question may be drawn.

The use of semi-structured interviews enable a follow up to the standard questions with each participant to allow further clarification by probing each participant's reasoning (Leedy & Ormrod, 2010). In semi-structured interviews each participant is asked the same set of questions although the researcher has the freedom to probe in order to gain clarification (Adams, 2015). The semi-structured interview was deemed suitable for the purposes of this study since it allowed for an opportunity to probes or ask follow-up questions in order to obtain information from the participants that might otherwise be concealed. The researcher conducted semi-structured interviews with the nine HoDs who had experienced school mergers. Since all the participants lived and worked in the Mahikeng subdistrict, arrangements were made with each individual HoD to conduct the interviews at each HOD's workplace after hours or at any suitable venue and time convenient to the HOD. During the interview, the researcher, with the permission of the participants, used a tape recorder to record all the interview responses. Leedy and Ormrod (2010) highlight that it is important for a researcher to record the responses verbatim and, hence, handwritten notes, a tape recorder or a laptop may be used to capture everything the participants say.

According to Bowen (2009), a document analysis is a systematic procedure for reviewing or evaluating documents, both printed and electronic (computer-based and internet-transmitted). Using document analysis as a data collection method enables a researcher to examine and interpret the data which has been collected in order to elicit meaning, gain understanding and develop empirical knowledge (Corbin & Strauss, 2008). The document analysis in this study included documents such as transformation policies, legislations, and guideline documents. In addition, this data collection method also enabled the researcher to identify the agencies that played a role in supporting school merger programmes.

1.9 Data analysis

Data analysis refers to the process of systematically searching and arranging the interviews, transcripts, field notes and other materials that the researcher accumulate to enable the researcher to come to research findings (Leedy & Ormrod, 2010). The transcriptions of the recordings were carried as soon as possible after the interviews while the interviews were still fresh in the researcher's mind. Inductive qualitative data analysis was used to analyse the data. Qualitative data analysis is primarily an inductive process of organising data into categories and identifying patterns and relationships between the categories (McMillan & Schumacher, 2010). Qualitative analysis is a relatively systematic process of coding, categorising, and interpreting data in order to provide explanations of a single phenomenon of interest, which is subjective in nature (Leedy & Ormrod, 2010). In this study the data was analysed using the following steps as suggested by McMillan and Schumacher (2010), namely, data collection (fieldwork), data organising, data transcription into segments, data coding, data categorisation, development of patterns and data preparation and presentation.

1.10 Conclusion

This chapter discussed the background to the study and presented the statement of both the research problem and the purpose of the study as well as justification for the study. In addition, the research question and research sub-questions were formulated.

Having presented the background to the study, the next section discusses both the literature review and the conceptual framework on which the study was based.

CHAPTER 2

LITERATURE REVIEW

2.1 Introduction

The previous chapter, Chapter 1, presented the background to the study, the statement of the research problem and the purpose of the study and a justification for the study. This chapter contains a review of existing literature on the experiences of HoDs of school mergers. The aim of this literature review was to generate the conceptual framework upon which the study was constructed. The literature review focused on existing literature on the research topic and the related research problem. In addition, the literature review also focused on debates and practices related to school mergers within the sphere of policy development and policy implementation. The literature review involved a detailed study and examination of both international and local literature.

The chapter comprises three sections. The first section is based on a review of the concept of a merger and a school merger while the second sections focuses on reviewing both international and South African literature on the experiences of school heads of departments of school mergers. The sources of this literature review included journal articles, conference proceedings, research reports as well as reports on, firstly HoDs' experiences of school mergers and, secondly, the effects of school mergers on the role of HoDs. Finally, the third section presented the conceptual framework that guided both the data collection and the data analysis.

2.2 Definition of merger

In order to understand school mergers, it is necessary to obtain an understanding and appreciation of what a merger is and who initiate it. It is not surprising the concept of a merger is defined differently by various researchers and also that, in most cases, these definitions contradict each other. According to Chambers and Lacey (1994:609), a merger refers to the amalgamation of two organisations into single organisation. This definition is supported by Botha (2001) who argues that a merger involves a mixture of two or more organisations to form an entirely new establishment. Although Botha (2001) maintains a merger is a mixture of two or more organisations, it is important to point out that the consequent organisation will retain the identity of one of the merging organisations, generally the larger organisation. In other words, it may be

said that there is domination by one organisation. Van Vuuren, Beelen and De Jong (2010) defines this domination as a takeover which is, in fact, a hostile merger with the combining of two or more organisations and control becomes the management's problem with the larger organisation then trying to gain control of the management. Liu et al. (2010) have articulated that a merger is the most dangerous form of an inter-institutional organisational solution and also an 'irreversible totality – the legal death of one or both parties in the creation of a new one. In this new establishment collaboration or cooperation as a team and the partners working together is expected. According to Weber, Tarba and Oberg (2013), if two organisations merge, they must reflect the attributes of both organizations to extend to the management of the merging organisations to control the merged organisation.

Botha (2001) maintains that there are three types of mergers, namely, a friendly merger, a voluntary merger and a forced merger. Botha (2001) defined a friendly merger as a “merger transaction endorsed by the target firm's management, approved by its stakeholders, and easily consummated”. In addition, a friendly merger involves planning between the two merging managements and agreement and compatibility between the cultures of the partners (Chambers & Lacey, 1994:611, 612). According to Skodvin (1999) and Botha (2001), a voluntary merger occurs when the institutions themselves have initiated the merger while a forced merger occurs when the instigator of the merger is external to the institutions in question. In addition, Pinheiro et al. (2016) claim that that a forced merger is initiated by public authorities and, as such, it is perceived by some actors as being a top-down process. However, the types of merger that happens in the school context are the friendly and voluntary mergers.

School mergers are often understood as a means for realising certain gains (Skodvin, 1999), for example, economic efficiency, by merging small schools into a bigger school. The schools where low numbers of learners are not only a problem in villages and rural areas but also in urban and peri-urban areas as they are economically efficient or effective (Lethoko, 2016). However, according to Jacobsen (2012), in order to understand why disagreement happens between employees, it is necessary to understand how the school merger affects everyone involved, the relationships between individuals and the informally organized groups, and formally organized groups.

Accordingly, this study defined a school merger as the process whereby two or more previously separated schools are joined by concentrating limited resources into one new, single school. In the case of a friendly and voluntary merger such a merger results from agreement between the management of two to three schools to be combined into one. The DoE should consult the schools and together they should initiate the merger where their consensus exists as well as approval on the part of the stakeholders. Generally, such a merger would be easily concluded.

2.3 School merger

Both during and after the higher education mergers in 2004, mergers within the educational sector in South Africa become more prevalent. According to Lethoko (2016), the majority of mergers in the South African situation were motivated more by political change ambitions rather than productivity. However, in countries such as Australia, the United States, the Netherlands and China, schools were generally merged in order to increase efficiency. For example, in 1990 there was a primary school in almost every village in rural China. Liu et al. (2010) alluded to the fact that policy had tried to provide equal resources across all primary schools but that it had failed and, thus, it had been a mere waste of resources. Therefore, as a substitute, in 2001 a new programme of school mergers was launched that began to explore the possibility of concentrating limited resources on a smaller number of schools.

As already mentioned, the schools with a small number of learners are not found only in villages and rural areas but also in urban and peri-urban areas. At the time of the study several international and local policymakers and administrators were facing decreasing learner number in their municipalities and schools (Pinheiro et al., 2016). As a result, according to De Haan et al. (2016), the majority of schools in villages and in rural and urban areas locally or internationally have faced or will face the question of either remaining as small schools or else merging with several other small schools into larger schools.

2.3.1 International perceptions and some lessons from school mergers

According to Duncombe and Yinger (2007), both the choices of remaining as small schools or merging with some other small schools into larger school have possible advantages and disadvantages. The advantage of operating small schools is the competition between these small

schools while the disadvantage is the inability to provide the necessary resources. On the other hand, the disadvantage of big schools is the lack of attention to individual learners while the advantages include the provision of better teachers and the reduction in the number of schools to be managed (De Haan et al., 2016).

According to Liu et al. (2010), the proponents of school mergers maintain that they improve educational quality by enhancing equity through providing poorer children with access to schools that are supported with better educational resources, especially quality teachers and facilities. Both De Haan et al. (2016) and Liu et al. (2010) agree that school mergers often promote fair decision-making procedures in the restructuring of the resources, status, space and rewards between the merged schools. Since the schools differ according to district and even circuit offices (De Haan et al., 2016), school mergers in the North West province involve the disbanding middle schools, which offered Grades 7, 8 and 9, and reclassification in order to realise the primary and secondary schooling system (NWDoE, 2016). In promoting fair decision-making procedures, the gathering, assessment and evaluation of information on the educators, HoDs and principals of the merging schools is imperative if competing interests are to be balanced. Further to being given the opportunity to be heard, there must also be no bias and, finally, the decision must have some basis in fact or reasoning for placing HoDs either in primary or secondary schools (Lipponen, Olkkonen & Moilanen, 2004).

According to Skodvin (1999), school mergers are often perceived as a means for attaining certain improvements. He claims that a school merger represents a way of attaining economic efficiency by the merging of small institutions with larger ones. Similarly, De Haan et al. (2016) claim that a school merger decreases the fixed costs of individual schools because the merged school is likely to lead to economies of scale. For example, as a merged school grows and learner achievement increases, a department of education will have a better chance to increase its efficiency than may otherwise have been the case. This is consistent with the claim by Liu et al. (2010) that the school merger is supposed to make education more efficient by means of the saving in costs gained by increasing the level of production by the transfer of more resources to the new, merged schools, which is part of the merger programme. Similarly, Duncombe and Yinger (2007) conducted a study in which they collected data from rural school districts in New York State to investigate whether school mergers cut costs. The study found that, because of the importance of the

economies of scale, school mergers has a significant impact on reducing the functional costs for small rural school districts in New York State. This supports the fact that a department of education will enhance efficiency by increasing learner achievements through transferring more resources to merged schools. By disbanding former middle schools through reclassification (s 12A of SASA, Act No. 84 of 1996), school mergers in the North West province succeeded in reducing the functional cost of one principal, the SMT and educators (NWDoe, 2015).

In terms of practice, little is known about the effect of school mergers on learner achievement. In order to compare the effects of school merger on learner achievements, Liu et al. (2010) combined a difference-in-differences method with propensity score matching methods and found that primary school mergers that had taken place in 2002 in China had not harmed student performance measured in 2006. The findings of Liu et al. (2010) are in line with those of De Haan et al. (2016), who conducted an empirical investigation by analysing the effects of school merger reforms on learner achievement in Dutch primary education. This reform was executed by increasing the minimum required school size, thus leading to an increase in the actual school size and a reduction in the number of schools. The results of their investigation showed that, in relation to the baseline school size range, the bigger schools that had resulted from school mergers had led to improved learner achievement.

In contrast, the critics of school mergers warn that, in the case of several school mergers, while the number of learners in the merged schools increases, the quality of the teaching facilities, the school size and the number of teachers do not rise enough (Lipponen et al., 2004). These critics stated that, in such cases, administration, teaching and learning in the merged schools suffer with some even arguing that education does not improve (Pinheiro et al., 2016). Thus, the merger programme, which was designed to improve equity, may, ironically, even be regressive in its effects. De Haan et al. (2016) claim that working with a number of small schools, on the other hand, gives the learners a wider choice of schools and that may even enhance competition between schools. In agreement with De Haan et al. (2016), by means of variations in the timing of school mergers across states in the United States, Liu et al. (2010) found that the students educated in states with smaller schools obtained higher returns and completed more years of schooling as compared to their counterparts in states with larger schools.

Lessons from prior private and public school mergers show that by transferring more facilities and teaching staff to the merged schools the mergers do not deliver savings. Duncombe and Yinger (2007) maintain that researchers have not reached an agreement on the cost impacts of school mergers. Nevertheless, school mergers are likely to remain on the education policy agenda in many countries, particularly when school districts are under pressure to cut costs and enhance pupil performance. In his study on school mergers in the United States of America between 1960 and 1980, Kerr (1991:3) observed that school mergers were not intended to bring an end to a discriminatory system of education based on language and other alleged human issues, such as gender, creed, race, etc.; instead, they were aimed delivering an inclusive, democratic education system intended to advance the entire society. In addition, Nguyen and Kleiner (2003:447) claim that the market shares of school mergers are increased by decreasing costs and improving service delivery. In Hong Kong school mergers amalgamated small schools in order to compete at the international level.

School mergers are not easy or a smooth process except when, according to Goedegebuure (2012), they are based on a sound strategic rationale and are systematically planned and well effected. According Skodvin (2014), if a school merger is to succeed, planning is critical before, during and after the process of merging. He argues that one of the schools involved has a leading role or takes on the role as a leading school throughout the merger process. He further argues that the tactics involved are either a bottom-up or a top-down process, or a mixture of both. Top-down procedures are implemented in the majority of government initiated mergers but they are often linked to considerable conflicts and tensions among both education the teaching and administrative staff. It would, therefore, appear that school mergers in general are typified by top-down rather than bottom-up processes.

2.3.2 The South African setting for higher education mergers

In South Africa higher education was the first education sector to experience mergers. These mergers were motivated by politics from 2004 to 2007 in order to unify the then fragmented higher education inherited from the apartheid system (Lethoko, 2016). This was confirmed by Arnolds et al. (2013), who highlighted that countries such as Australia merged their higher education institutions in order to increase efficiency but that, in South Africa, higher education mergers were

driven more by political ambitions to merge the disjointed higher education landscape inherited from apartheid rather than efficiency. This resulted in higher education institutions not being given the opportunity to select their partners in line with their existing culture, curriculum and employees have. According to SASCO (2009), there was no strategic fit in terms of cultural compatibility but, instead, just an arranged marriage. In sharing the same sentiments, Naidoo and Baloyi (2016) claim that higher education mergers in South Africa were viewed as merely a quantitative reduction of the apartheid planned higher education of the past.

Naidoo and Baloyi (2016) further maintain that a qualitative viewpoint should have been adopted with the curriculum being viewed as an integral aspect of the mergers. Instead, it may be said that the higher education mergers represented no more than a numerical decrease of the number of apartheid higher education institutions from 36 to 21 instead of improving efficiency with a different academic nomenclature being introduced to advance access, redress and equity and the curriculum at the centre (Naidoo & Baloyi, 2016). Three situations, including partial compromise, appeared to have dominated the mergers with the merged institutions having to compromise and give opportunities to each other despite the fact that the compromise always favoured the 'stronger' partner, as in the case of UNISA. The second situation involved the status quo whereby the merged institutions continued to work individually, for example, the University of Venda, the Giyani College of Education and the University of the Witwatersrand (Jansen, 2003).

It is, therefore, clear that the higher education curriculum was the core issue which should have been used to regulate access and equity and redress past injustices (Mkhonto, 2007:445). He claimed that the curriculum should take centre stage in order to address the unequal resources along racial lines and delivery of learning opportunities along gender, class, and geographic settings and further harmonise the productivity in the higher education curriculum. According to the DoE (2005:5), in mergers the higher education curriculum is used to control access and equity and redress past injustices. In addition, Mfusi (2004) postulates that the curriculum is at the heart of both the teaching and learning operation in higher education. However, according to Makgoba and Mubangizi (2010:1), higher education mergers are a transitional intervention aimed at advancing nation building. In evaluating the consequences of the merger of 26 merged partners to form 11 new higher education institutions in South Africa, Karodia, Shaikh and Soni (2015) postulated that using student admissions as a basis had three broad consequence, namely, mergers

that resulted in well-functioning new institutions, failed merger, and a set of new universities that are still responding to the consequences of mergers.

It is, therefore, clear that the mergers in higher education in South Africa were experimental and full of mistakes. They did, however, realise the anticipated political and educational objectives although, according to Mathabe (2004:16), without local and international ‘best fit’. Nevertheless, they did still represent an outstanding achievement. However, claims by Mathabe (2004) do not suggest that the initiators of the higher education mergers and the South African government did not study other international mergers and Schoole (2005:159) corroborates that comprehensive lessons on principles of the higher education mergers were learnt from some of reputable countries such as Norway, Australia, England and the USA.

2.3.3 The South African setting of school mergers

There has been an increased interest in South Africa and elsewhere in the study of school mergers as related to learner achievement and cost effectiveness (De Haan et al. 2016). The considerable body of literature on the variables related to school mergers provides information on measures for solving the problems and challenges related to school mergers globally, for example, problems of school fragmentation and small institutions where there has been a decline in the enrolment of learners and challenges related to the cost effectiveness of maintaining such schools, confronting external threats and the non-performance of schools (Pinheiro et al., 2016; Skodvin, 2014; Harman & Harman 2003).

The DoE in South Africa mitigated these problems and challenges related to school merger by passing legislation on school mergers. Public school mergers are addressed in section 12 A of SASA, Act No. 84 of 1996 where the stipulations in respect of school mergers are addressed by law. What constitutes a small or a large school is addressed in RRMUNSI, 2014 with a minimum capacity of 135 learners in primary schools stipulated in regulation 5(3)(ii) and a minimum capacity of 200 learners in secondary schools stipulated regulation 5(3)(i). The main reasons for the merger or closure of small, rural and farm schools include number of learners, curriculum considerations, accessibility, infrastructure and the reclassification of schools.

The drafting of the National Guidelines on the streamlining of small and/or non-viable schools with a small number of pupils was completed in 2009. These guidelines were aimed at the rationalisation of small or non-viable schools – the agreements in section 14 in conjunction with section 12A of SASA, Act No. 84 of 1996. The parties concerned will promote access for learners, parents and educators to these small or non-viable schools, including learners in a private property who can be merged with public schools. Many small schools, primarily rural and farm schools, are in complex settings and are characterised by extreme diversity. The numerous challenges facing small, rural and farm schools were resolved by the mergers and closures of schools which took place from 2009 until 2012. The aims of the mergers and closures of rural and farm schools included improving the quality of education offered; expediting the resourcing of schools; promoting access to schools and ensuring the retention of learners and educators in the rural and farm schools (DoE, 2009).

In the North West province, particularly in the districts of the former Bophuthatswana Bantustan, middle schools – from Grades 7 to 9 – formed part of a unique schooling landscape. There were three schooling system in the former Bophuthatswana, namely, primary schools from Grades 1 to 6, former middle schools from Grades 7 to 9 and high schools from Grades 10 to 12 (NWDoE, 2014). The school mergers which took place in the North West province involved a process through which middle schools were dissolved by merging them with either primary or secondary schools in order to address the prevailing schooling system, as dictated by SASA, Act No. 84 of 1996 and the NWDoE applied section 5(2) and section 5(4). These sections reclassified schools into primary and secondary schools. In the North West the majority of the school mergers revolved around middle schools, thus ignoring the broader goals of school mergers and thereby failing to address the problems of small and/or non-viable/dysfunctional schools by improving efficiency (DoE, 2009)

As highlighted in local literature there are lessons that may be learnt from the higher education mergers about the consequences of such mergers. According to Ahmadvand, Heidari, Hosseini and Majdzadeh (2012), the lessons may be drawn from mergers that have resulted in well-functioning new institutions, failed mergers and the new universities still in the process of responding to the consequences of the mergers.

The lessons that may be learnt from both the local and international literature referred to include the following: Firstly, according to SASCO (2009), it is always important for the education authorities which initiate school merger to measure the strategic fit of the merging schools and to take into account the issue of cultural compatibility; secondly, the impact of the school merger on the teaching staff involved (Pinheiro et al., 2016; Skodvin, 2014; Harman & Harman, 2003); thirdly, the effect of the merger on learner achievement (Pinheiro et al., 2016); fourthly, the measures in place to assist those displaced HoDs who survived the merger to cope with the new school; and, lastly, the existence of the processes to be followed during the pre- and post-merger phases (Lethoko, 2016).

2.4 Reasons for a school merger

Some schools that merge may do so because they were not performing very well while other schools may merge because of a determined and innovative school principal (bottom up process) (Pinheiro et al., 2016). In both cases, according to Botha (2001), there is an arrangement between the managements of the schools involved, there is permission that exists between the merging schools and there is compatibility between the cultures of the partners. These types of merger are appropriate to the school context.

In terms of ‘non-viable schools, namely, those with low number of learners (Regulations Relating to Minimum Uniform Norms and School Infrastructure, 2014), it would appear that school mergers are a tool for establishing larger and additional viable units, quality improvement, enhanced economic efficiency and increased effectiveness (Skodvin, 2014, Pinheiro et al., 2016). Pinheiro et al. (2016) claim that, through school mergers, a wide array of problems may be solved, for example, fragmentation, small size institutions and a lack of financial and specialist viability, thereby enabling external threats to be confronted. According to Duncombe and Yinger (2007), school mergers are widely viewed as a way for the DoE to cut costs while, according to Lethoko (2016), the aim of school mergers is to increase efficiency and effectiveness in terms of managing the rapid and considerable growth in learner numbers. On the other hand, Lethoko (2016) also claims that the rapid and considerable growth in learner numbers in turn imposes significant stresses on the merged schools and often results in unhappy and uncontrollable staff and learners.

He further that school mergers increase government control of the direction of education systems, thus guaranteeing that public schools serve both national and regional economic and social objectives in a more direct way.

However, according to the DoE (2009), the aim of school mergers and closures is to solve the following problems, namely, the number of learners; curriculum considerations; accessibility of schools for learners; improvement of school infrastructure; improving the retention of learners; attracting and retaining educators; schools on private property where farm owners deny access to learners; reclassification of schools and twinning of schools.

2.5 HoD experiences of school mergers

According to Urio (2012), the HoDs in schools are individuals whose roles place them between the senior management team and the educators and whose job descriptions do not extend beyond the normal teaching and pastoral functions. Thus, heads of department are simultaneously leaders, managers and administrators. Quality education depends primarily on the way in which schools are managed, and their capacity to improve teaching and learning. Urio (2012) further maintains that good leadership is required if bold measures are to be adopted to address the challenges of improving the quality of teachers and teacher effectiveness in schools. On the other hand, Bush and Glover (2002:10) perceive the HoD as an instructional leader who is required to ensure that teaching and learning takes place between the educators and learners. Thus, the term instructional leadership defines the roles and responsibility of the HoD (Mafuwane, 2011).

The scheduled teaching time of HoDs comprises 85% of their total working time. Their core duties include their scheduled teaching time; relief teaching; extra and co-curricular duties; pastoral duties; administrative; supervisory and management functions; professional duties and planning, preparation and evaluation (ELRC Resolution No. 7 of 1998). Furthermore, according to the ELRC Resolution No. 7 of 1998, management in education should be able to draw on the professional competencies of HoDs while it is incumbent on the authorities to allocate both authority and responsibility that will ensure the building of the HoDs' basic skills and capacity, thereby enabling them to provide support to the teachers in the following ways, namely, mentoring, guiding and supervising; administration and management of curriculum, subject and phases as well as

monitoring the teachers' work (De Haan et al., 2016; Liu et al., 2010). De Haan et al. (2016) further agreed that monitoring should include checking lesson plans; conducting class visits, checking learners' books and carrying out follow ups (De Haan et al., 2016).

School mergers, which involve a change in schools, bring about challenges for displaced HoDs such as work errors and loss of motivation due to anxiety and low morale as their roles, responsibilities and authority are challenged. Goedegebuure (2012) claims that motivation impacts directly on the performance of HoDs and their own culture of self-worth within the merged schools. In the case of higher education mergers in South Africa where the knowledge of school merger is derived, Lethoko (2016) maintains that thousands of university employees found themselves in annoying and undefined times during the merger processes involving various institutions. He further states that they were worried about job losses, loss of posts; job security and uncertainty, especially because the mergers were driven from outside and the institutions were not given an opportunity to choose their own partners.

The challenges the HoDs of the former middle experience as a result of mergers include fear, stress and tensions as a result of the fact that the essential knowledge and skills: command of subject matter, interpersonal relations skills, communication skills, leadership skills and ability to work with teams required to perform successfully in the former middle schools are no applicable after the mergers. According to Goedegebuure (2012) and Pinheiro et al. (2016), there is often resistance on the part of HoDs and, thus, principals should be prepared to handle tensions and opposition. The resistance on the part of HODs arises because they experience professional disagreement, fear of the unknown, loss of identity, loss of personal goods, loss of social relations, additional work and new responsibilities, changes of power relations and changes in social environments, etc. (Jacobsen, 2012). Jacobsen (2012) further stated that, in order to understand the reasons for this opposition on the part of HODs, it is necessary to understand how the change affects each individual as well as the relationship between individuals, namely, social relations.

2.6 The effects of mergers

The implementation of school mergers in South Africa and elsewhere is fraught with conflicts and tensions. Research suggests that schools that merge are likely to differ from schools that do not merge (De Haan et al., 2016) due to the HoDs' uncertainty, low morale and frustrations after the

school mergers (Jansen, 2003, Arnolds et al., 2013). The majority of these school mergers do not meet the expectations set at the outset because according to Skodvin (1999), a school merger is radical change that affects not only management but also the ‘souls’ of those who are involved. After school mergers HoDs often experience intense emotions pertaining to job insecurity (Arnolds et al., 2013). Skodvin (1999) describe these changes as both drastic and dramatic (Skodvin, 1999) as the professional self of the HoDs that has evolved over their career stages during their tenure at the schools are challenged (Lee & Yin, 2011). This view is shared by Duncombe and Yinger, (2007) who are of the opinion that a school merger represents the most dramatic change possible in education governance and management because the school merger shatters the attitudes and beliefs, motives, values and experience of the HODs involved.

The institutional changes faced include the leaving of existing forms of authority, changes in institutional norms, objectives and academic programmes, as well as the alteration of organisational procedures. This assertion is supported by several studies which focused on the impact of mergers on employees and, in particular, on the following variables, namely, employee observations with regards to the merger (Hay & Fourie 2002); job security, gratification and employment relationships after the merger (Linde & Schalk 2006); new merged structure and staff equity profile, conditions of service and human resource competencies (Schultz, 2010; Arnolds, et al., 2013)

Botha (2001) cites the lack of a clearly defined transformation process as one of the most common problems in mergers. She also contends that the role, behaviour and aptitude of management often distracts from how well employees cope with the change. De Haan et al. (2016) suggest that the executives involved in mergers and acquisitions often ignore the issues of culture, values, behaviour and working styles which need to be carefully managed from the very outset of the process. According to Lethoko (2016), mergers also have an impact on the merged organisations. Studies have been conducted in South Africa on the following issues in relation to the impact of mergers on the merged organisations, namely, goal clarity, trust in management and perceptions of organisational readiness (Linde & Schalk 2006); development of identity of the merged institutions, the branding and the positioning of the new entity (Hay & Fourie, 2002).

After this extensive review of both local and international literature, I acknowledged that there is much on mergers. The takeover study was conducted on the relationship between the perceived statuses of an organisation after a takeover and the employees' identification with the new organisation. Quantitative questionnaires were administered to approximately 234 employees of a corrugated board producing company which had taken over a smaller company eight months before the study (Boen et al., 2006). The study revealed that the takeover had been hostile in respect of the employees from the smaller company. The impact of a large school consolidation reform in Dutch primary education was compared with student achievement. Using an instrumental variable strategy, it was found that the larger schools that had resulted from the school consolidation had led to improved student achievement (De Haan et al., 2016; Liu et al., 2010). Duncombe and Yinger (2007) and Skodvin, (1999) are also of the opinion that the consolidation of organisations or institutions makes fiscal sense. A qualitative case study research aimed at assessing and interpreting the merger process between two public secondary schools in the Norwegian educational sector found that the new secondary school was performing better than the former two public secondary schools. A qualitative study examined teachers' emotional experiences during the national curriculum reform of senior secondary education in China. The study revealed that school mergers had impacted on the teachers' emotions.

This study differed from the studies cited above as the focus of this study was on addressing the lack of studies that have provided knowledge on the impact of school mergers on HoDs. As a result of school mergers, HoDs are often moved to a level at which they lack knowledge and skills required to perform their expected roles and responsibilities as instructional leaders. The study used purposive sampling to select nine HoDs. It emerged that the HODs' roles and responsibilities had drastically changed with the HoDs having to spend time supervising and teaching Grades 7 to 9. The challenges they faced included a lack of curriculum knowledge/content gap, and a heavy workload. There was clearly a need for counselling as the study found that the majority of the participants wanted to leave their new schools. There was also a need for training and support in relation to essential skills and capacity. Finally, the proper placement of HODs was urgently required. I interacted with the participants and listened to accounts of their perspectives of the research topic during one-on-one, semi-structured interviews (Tashakkori & Teddlie, 2003). It has been recommended that open questions be posed during interviews to generate rich data.

2.7 Conceptual framework

In the research context a conceptual framework is a reliable and inclusive framework that encompasses the research question and framing hypothesis or make informal, tentative predictions about the possible outcome of a study (Tashakkori & Teddlie, 2003). In support of this assertion, Adom et al., (2018) explain that a conceptual framework is used in research to outline choices, or to demonstrate a preferred approach to a thought or an idea. It may also act like a map to provide coherence for an empirical inquiry. The use of concepts related to a research topic may be used to create a framework for research in order to design the data collection instruments as well as a framework for understanding, analysing and explaining the data which has been collected (Tashakkori & Teddlie, 2003). According to Maxwell (2005:35), a conceptual framework is constructed and not found, and the coherence thereof is built – it is not something that exists and is readymade. There are four possible sources for building a conceptual framework, namely, the researcher’s own experiences and knowledge; existing theory and research; exploratory research and thought experiments. This was informed by the experiences of the researcher as a principal of a secondary school to which, in in 2010, one of the displaced HoDs from a middle school had been deployed, existing research on school mergers and the experiences of HoDs of school mergers. The study used exploratory research during which one-on-one, semi-structured interviews were conducted (Tashakkori & Teddlie, 2003).

A number of different concepts emerged from the literature review. For the purposes of the study the focus was on the following concepts which guided both the data collection and the data analysis, namely, the superordinate school; the basic skills and capacities of HoDs; the human relations movement; identity change; teaching and administration and a defined transformation process.

The conceptual framework used in this study comprised two sections. The first section detailed three major issues which impact directly on displaced HoD, namely, the superordinate school; the basic skills and capacities of HoDs; and the human relations movement. These issues were referred to in the conceptual framework as the primary or major challenges because they formed the basis of the entire study which aimed to answer the primary research question: How do the HoDs in the North-West experience school mergers? In other words, these primary challenges encompassed the issues that had prompted me to engage in this study, namely, the challenges experienced by

HoDs who had moved from former middle schools to either primary or secondary schools as a result of the merging of schools in the North-West province. The second section of the conceptual framework provided an overview of four variables, as suggested by the literature, namely, identity change; teaching, administration and defined transformation process. These concepts were referred to as secondary challenges because they addressed the following secondary research questions viz.

- What role did the HoDs play in the school merger process?
- How have school mergers affected the role of HoDs?
- What challenges do HoDs experience in performing their roles after displacement?
- What support do the HoDs receive to assist them to cope with displacement?

The purpose of the study was to address the primary research question.

Figure 1: Representation of the conceptual framework of the study

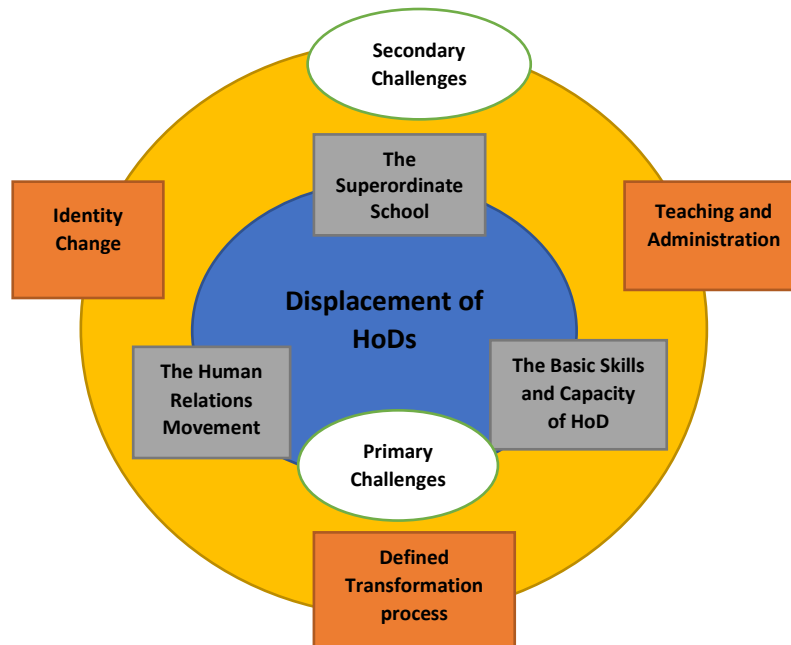


Figure 1 represents the conceptual framework upon which the study was based. The two sections of the conceptual framework (Mafuwane, 2011) are discussed below.

2.7.1 The primary challenges

The merging of former middle schools with primary or secondary schools in the North-West province had resulted in HoDs being deployed to either primary or secondary schools but not by choice. This movement of HoDs from the former middle schools to levels at which they were not qualified to teach and to manage the curriculum signified the displacement of the said HoDs. The reinstatement of a culture of teaching and learning; coping with limited resources and ensuring accountability was always going to be difficult (Naicker & Mestry, 2013). In order to answer the primary research question the three major challenges that were identified in relation to the displacement of HoD in the literature review and are discussed below.

2.7.1.1 The superordinate school

A school merger represents the amalgamation of two or more schools, in which the resulting school maintains the identity of one of the schools, usually the larger one. The resulting school may be said to be the new superordinate school (Botha, 2001). The two or more different, distinct school groups form one common ingroup and develop a new identity over time with new relationships, a different culture and social life changes (Terry & McKimmie, 2016). In the context of HODs school mergers involve the deployment of HoDs to a new superordinate school. If this scenario is applied to the situation in the North-West province, where former middle schools were displaced by their joining the primary or secondary schools, the new superordinate school formed was either a primary or a secondary school.

2.7.1.2 The basic skills and capacity of the HoD – Professional identity

School mergers occur when changes in education require the restoration of a culture of teaching and learning and the improvement and maintenance of a high standard of education. The movement from former middle schools to either primary or secondary schools brings about a change of roles for HODs as well as several expectations on their part. According to Lee and Yin (2011), HoDs' professional identity reflects the way in which HoDs, as practitioners, view themselves and others as HoDs. Thus, it is a construct of the professional self that evolves over the various career stages (Lee & Yin, 2011). It defines the “social and policy expectations of what a good HoD is and the educational ideals of the HoD”. Such a professional identity may be shaped by school, reform, and political contexts (Day & Kington 2008).

2.7.1.3 The human relations movement

In line with the human relation movement, HoDs respond primarily to the social context of the workplace, including social conditioning, group norms and interpersonal dynamics (Sarker & Khan, 2013). However, the mergers ignore the satisfaction of the HoDs' basic needs as the key to increasing learner productivity. It is now well-acknowledged that mergers may have several harmful effects on HoDs' well-being and behaviour, including high levels of stress, lowered job satisfaction, and reduced new superordinate school identification (Johnson et al., 2005).

2.7.2 The secondary challenges

The movement of HoDs from the former middle schools to the levels for which they were not qualified has created a content gap/lack of curriculum knowledge. In addition, the roles and responsibilities of those HoDs who have been displaced have become a challenge. The implementation of a forced school merger may damage the "new school" environment in relation to the many basic roles and responsibilities of HoDs. In their related studies, Botha (2001) and Skodvin (1999) reported that, in a forced merger, the instigator is external, as opposed to a friendly and voluntary merger where there is no agreement between the management, stakeholders of merging schools with the DoE and there is no consensus in relation to the compatibility of the cultures of the merging schools. This does not apply to a friendly and voluntary school merger. In order to answer the secondary research questions, three secondary challenges in relation to the displacement of HoDs that were identified in the literature review are discussed below.

2.7.2.1 Identity change

The merger of former middle schools with primary or secondary schools to form new superordinate schools forces the HoDs involved to change their identities drastically (Duncombe & Yinger, 2007; Skodvin, 1999). The former middle school HoDs acquired in-depth understanding of the middle school setup over a period of more than five years, as they were forced to change their identities. The HoDs' personalities, emotions and passion had been over the years in the atmosphere of the middle schools where they had taught (Cartwright & Cooper, 1993). The HoDs in these former middle schools all had more than fifteen years of experience and, thus, relocating them meant moving them out of their comfort zones.

2.7.2.2 Teaching and administration

The former middle school HoDs were forced to teach and administer certain curricula in the new superordinate school irrespective of their qualifications or whether or not they were comfortable in that new school (Amiot et al., 2012). This set the tone for my engagement with this study because the work performed by an HOD includes managing the curriculum, instruction and monitoring and giving feedback on the teaching and learning (Goedegebuure, 2012; Pinheiro et al., 2016). The correct qualification for the correct level is required for the HoDs for teaching and administration. The changes involved in their deployment after the school mergers included their leaving existing forms of authority and changes in terms of the middle school norms, objectives and curriculum programmes as well as the school procedures (Cartwright & Cooper, 1993).

2.7.2.3 Defined transformation process

According to Skodvin (1999), considerable planning is required before, during and after the merger process. The role, behaviour and ability of the school management as well as management at the circuit and district levels involved identifying and classifying all the HoDs from the former middle schools according to the requirements of the primary and secondary schools (De Haan et al., 2016; Liu et al., 2010). It is also imperative that the issues of culture, values, behaviour and working styles are carefully managed from the very outset of the merger process.

2.8 Conclusion

This chapter provided an outline of the processes involved in school mergers as detailed in existing literature review which also generated the conceptual framework on which the study was based. The presentation school merger process was supported by SASA, EEA, ELRC and other relevant legislations.

Having presented the framework on which the study was based, the next chapter discusses the research methodology and research methods which were used in the study.

CHAPTER 3

RESEARCH METHODOLOGY

3.1 Introduction

The previous chapter presented the literature review that generated the conceptual framework upon which the study was based on. This chapter discusses the research methodology used in the study and explains how the research was conducted and also steps and procedures that were followed to collect the data required to answer the research questions. The chapter also focuses on the sampling process and described the selection of the respondents, how the researcher gained access to them and built rapport with them as well as the way in which the information obtained was recorded and the data analysed. The chapter also explains the rationale for the qualitative research paradigm and the steps taken to ensure the validity and reliability of the study (Henning, Van Rensburg & Smit, 2004:10).

The participants' details were presented in detail to give the reader to have a sense of them. The interview procedure was fully described, including where and how the interviews were conducted.

In order to discuss and understand the impact of the school mergers in the NMM district of NWDoE and to discover from the HoDs themselves how they explained what they did, a philosophical approach was adopted that emphasised the personal perspective and the interruptive framework (Creswell, 2009:27) The purpose of the study was to examine the interaction and decision flow within the school community to establish both the scope of the mergers and the staff rationalisation as a result of the mergers and ascertain trends in the challenges and problems faced by the HoDs in question. The chapter further explains the rationale behind the methodology employed, how the research was conducted and how the requisite data was gathered, processed and administered. As indicated in chapter 1, the purpose of the study was the guiding principles throughout the study.

An empirical investigation was required to understand whether the HoDs in the NWDoE fulfil a teamwork role in the implementation of SASA and the transformation of the school system as directed by SASA.

3.2 Qualitative research methodology

Qualitative research methodology was used for the purposes of this study because the main aim of the study was to understand and explore the school merger system. It was, therefore, deemed appropriate, relevant and important to utilise qualitative research because the focus of the study was on human behaviour and social action (Creswell, 2009:194). As suggested by Creswell (2009:125), based on the explorative nature of the study, qualitative methods of data collection were used as were research instruments such as semi-structured interviews and document analysis.

A qualitative understanding of social phenomena takes the form of face-to-face interrogation which starts with words such as “how”, “why” and in “what way”. Qualitative research is exploratory and aims to understand people’s view of their world. In other words, qualitative research it is interactive, face-to-face research which requires in-depth interviews and unstructured interviews (Creswell 2009:129). Thus, the qualitative research conducted revealed how the educational experience in NWDoE schools differed from that required by SASA (1996). As mentioned above, Ary, Cheser and Jacobs (2010:25) confirm that qualitative research is based on a differential philosophical approach, which sees the individual and his/her world as so interconnected that essentially the one has no existence without the other. Closely linked to the issues pertaining to qualitative study is the strong influence of knowledge use to identify the insider perspective and the use of methods that ensure the credibility of the findings.

3.3 Research Paradigm

According to Cohen, Manion & Morrison (2011) a paradigm as a “world view”, it is an “assumptions or basic set of beliefs” that guides a researcher’s inquiry. Researcher brings his own sets of beliefs, paradigms, to the research project which inform the conduct and writing of the study. Guba (1990) points out that research paradigms may be characterised through their ontology, epistemology and methodology. The ontology behind the study suggested that there is no single reality or truth about school mergers with individuals in groups (less realist) and for example, former middle school HODs, created reality. The paradigm used was interpretive because the researcher intended to make meaning of the experiences of the participants. Epistemology is concerned with how knowledge is constructed (Cohen, Manion & Morrison, 2011). In this study the knowledge and experiences of school mergers were generated through making sense of the

experiences, and activities of the former middle school HoDs and the events to which they had been subjected after the school mergers in the North West province. Thus, the study was directed within the interpretive paradigm, which accepts that knowledge may be constructed and that there are multiple realities that may be determined from the given situation. Through this paradigm, the research ascertained different perspectives and different realities of the former middle school HoDs regarding their experience of school mergers. This paradigm enabled the data to be interpreted from the perspective of both former middle school HoDs and the researcher.

3.4 Selection of participants and design

The study was conducted in the NMM district in the North West province in six (6) mainstream schools (Schools A, B, C, D, E and F) in the Mahikeng subdistrict. Since the aim of the study was to understand and explore what defined the merging of middle schools with high schools and primary schools, purposeful sampling was used. McMillan and Schumacher (2010:319) confirms that qualitative researchers use purposeful sampling and they select information-rich cause for in-depth study when they want to explore certain elements of these cases but without wanting to generalise about all such cases.

It is important to highlight that Creswell (2009:178) argues that the notion behind qualitative research is the purposeful selection participants or sites that will best help the researcher understand the research problem and answer the research question(s). Although the sample size of nine participants used in the study may seem somewhat small, it is, nevertheless, typical of qualitative sample sizes. Creswell (2007:126) indicates that one general guideline in qualitative research is not to study a few sites or individuals only but it is about each site or individual studied. Therefore, in this study, the selection was not influenced only by the depth and extent of the information sought (McMillan & Schumacher 2010). Creswell (2007:27) mentions that it is important to be aware of the focus of a research design as a plan to explore and understand individuals or groups.

In qualitative research, decisions about research design and strategies are ongoing and are grounded in the practice, process and context of the research itself. This study proposed a qualitative research design in which the participants' words, actions and records (Leedy & Ormrod, 2010:137) provided relevant answers to the main research questions.

It is for these reasons that the study used face-to-face, verbal interactions with the participants to allow them to demonstrate their understanding of expenses, frustrations, challenges, problems and aspirations arising from the school merger process. This design helped to provide answers to all the exploratory questions posed in the process of the research (Leedy & Ormrod 2010:37).

Additionally, the qualitative study was preferred for three reasons, namely the data was collected in the natural setting of the participants. Secondly, this form of data collection was central because most of the descriptions and interpretations of data in this study were interpreted in words. Thirdly this was regarded as the best method for research because it offered the researcher with an opportunity to understand the social phenomenon from the participants' perspective. Understanding was acquired by analysing the many settings of the participants and by narrating participants' meanings which included their feelings, beliefs, ideas, thoughts and actions regarding the school mergers in the North West province (McMillan & Schumacher, 2010).

3.4.1 Setting

Former middle school HoDs in merged primary and secondary schools took part in the study. These former middle school HoDs were from both rural and township schools. All the schools had been built during the period of independent states before 1994 political transformation in South Africa.

These former middle school HoDs were located in different rural, semi-rural and township contexts. The middle schools had been built primarily by communities and their merging had resulted in uproar, instability and conflict between the educational authorities and the school governing bodies. The reason for choosing these former middle school HoDs was that they best reflect the complex activities involved in the merging of schools. In keeping with the principles of qualitative research it was important to choose key, information rich participants (McMillan & Schumacher 2006:322).

3.4.1.1 Background of the HoDs

These HoDs had been teaching and managing the curriculum in accordance with the independent state educational act of the former Bophuthatswana Bantustan of 1997. When political changes occurred, the independent state of Bophuthatswana was transformed into the North West province

of South Africa. However, the school system still comprised primary, middle and high schools and, hence, the restructuring of the environment as stipulated in SASA (1996).

During 2005, many of values and principles entrenched in the middle schools became redundant. The new South African Government, through the new constitution, introduced new values and changes into the school system. However, the North West province remained an “old system”, several years after the democratic dispensation. Most of the provinces used primary and secondary schooling system and the NWDoE had to review some aspects of education and the transformation of the schooling system as it used primary, middle and high school.

3.4.1.2 The HoDs in the North West province

Since 2005 the work carried by the HoDs in the North West province went through a process of transformation in order to address the prevailing geographical and physical environmental challenges. All the HoDs faced the challenge of school mergers and a complete shutdown of the middle schools. The NWDoE created focus groups to discuss either the upgrading of the middle schools to secondary schools or their downgrading to primary schools. Richer information on what defined the school merger experience was available primarily from the HoDs because, as middle management, they act as a buffer between the principals and teachers in schools. This was in line with the suggestion of Creswell (2007:119) that the researcher search for individuals who are accessible, willing to provide information and distinctive for either their accomplishments, their ordinariness and able to shed light on the specific phenomenon or issues being explored.

3.4.2 Participants

In seeking to identify the individual participants, it is important that the researcher understands and describes the desired attributes or profiles of individuals who are in possession of knowledge pertaining to the research questions. McMillan and Schumacher (2006:344) confirm that researchers must screen each potential interviewee for the attributes or profiles relevant to the prospective study.

During an in-depth interviewing process, the researcher reshapes the sequence of activities and explores his own knowledge about the participants. It is helpful for the researcher to be both open and sociable and to making decisions using democratic negotiation. In this study the researcher interacted with the participants on a one-on-one basis (Creswell, 2007:119), thus establishing a

relationship that facilitated the exchange of information. In qualitative research, the interview process includes individuals who have special knowledge, status, or communication skills (McMillan & Schumacher 2010:473).

The fact of the some of the HoDs served learners from deep rural communities meant that environmental conditions such the distance between the middle schools concerned and the primary and secondary schools played an extremely important role as this impacted on the ability of the schools to merge quickly and successfully. According to Yin (2009:11), a case study responds to “How” and “What” questions. Since the HoDs understood the geographical setting they would possess clear knowledge of the “how” and “what” of what may affected the success of the school mergers.

The nature of the research questions and the research aims of the study prompted the researcher to use other forms of sampling such as quota sampling. Quota sampling refers to a sampling procedure which strives to represent significant characteristics of the wider population. The researcher was seeking the opinions from all categories of HoDs from the former middle schools. Quota sampling was used to select participants in the same proportions that are found in the general population with attention being paid to ensuring equal numbers of male and females of comparable ages and from comparable social backgrounds. According to David and Sutton (2004:152), the units are selected according to the researcher’s own knowledge and opinion about units which they feel will be the most relevant to the research topic.

To this effect the sample comprised one subdistrict, namely Mahikeng, which was selected from the five subdistricts in the NMM district in the North West province. This choice was influenced by the proximity of the subdistrict to where the researcher was stationed. There were nine subjects in the sample. The nine HoDs from the former middle schools were from six different mainstream schools (Schools A, B, C, D, E and F). These mainstream schools comprised one primary school and five secondary schools. The HoDs were chosen because they had first-hand experience of school mergers and, hence, it was expected that they would be knowledgeable about the magnitude of the challenges faced in school mergers. In order to ensure quota sampling the subjects in the selection of participants comprised six female HoDs and three male HoDs.

3.5 Instrumentation

This study was a descriptive study and, thus, an interview strategy was utilised. As explained by Leedy and Ormrod (2010:148), the main aim of interview data is to record any potentially useful data thoroughly, accurately and systematically using audiotapes. They go on to explain that one of the advantages of an interview is that it may produce in-depth data. According to Mason (2002:62), the interview is the most popular instrument used in qualitative research to obtain information from respondents.

Furthermore, McMillan and Schumacher (2006:07) argue that an important contribution of the interview as an instrument is the fact that it provides the researcher with an opportunity to ask for clarification, more detail and more accurate answers. Mason (2002:62) notes that a face-to-face interview is a two-way process which allows free interaction between the interviewer and the interviewees with the respondents providing the researcher with information that they think is appropriate for the purpose of research.

Finally, as pointed out by Mason (2002:63), the interview is flexible and, thus, it allows the interviewer to re-adapt the situation to the respondents. This was for this study as the respondents were all HoDs with extensive and transformative leaders in their schools.

3.5.1 Role of the researcher

It is important to know that qualitative researcher may be described as the research instrument because the data collection is dependent on their personal involvement in the interviews in the research setting.

According to McMillan and Schumacher (2006:144), possible roles for the interviewer include that complete observer, full participant, insider observer, interviewer and the dual role of participant researcher. Thus, in line with this idea of a human instrument, the researcher in this study was the key research instrument in the sense that he collected the requisite data by interviewing the respondents.

When conducting interviews, the researcher may assume the role of inquirer, listener and technician as the researcher did in this study. Throughout the interview process the researcher guided and managed the process but did not in any way try to control it. As suggested by McMillan

and Schumacher (2006:346), as the guiding interviewer, the interviewer tried in every way possible to encourage the respondents with questions such as ‘What is it to merge schools?’ and suchlike.

The researcher was also responsible for interpreting the data, discovering meanings and establishing rapport and trust with the respondents. This was crucial because disclosure builds rapport (Creswell, 2007:124).

3.5.2 Semi-structured interview

Creswell (2007:140) describes an interview as a series of steps in a procedure aimed at the following:

- Identify the interviewees based on one of the purposeful sampling procedures.
- The interview is a verbal technique used to obtain information. As Mason (2005:62) states, an interview is “a conversation with a purpose”. A data collection method the interview may either be highly unstructured or semi-structured.

This study used semi-structured interviews to enable the researcher to probe for clarity as the aim of the interviews was to acquire information from the respondents in order to answer the research questions (McMillan & Schumacher, 2006:350). This study used semi-structured interviews to enable the researcher to probe for clarity as the aim of the interviews was to acquire information from the respondents in order to answer the research questions (McMillan & Schumacher, 2006:350). These authors said it is advantageous to use semi-structured interview to easily compare participant’s answers; can reach a large selection of participants; easy to repeat more flexible form of the structured interview. It was possible in the semi-structured interview to focus on key questions while at the same time probe and expand the participant’s response. However, they also highlighted the limitations in using semi-structured interviews, which may include the difficulty to obtain detailed data or even to share information and tendency to give unreliable data. Keeping these limitations in mind, I prepared semi-structured interview protocol (Annexure F) to guide me in asking questions and conducted individual semi-structured interview with nine participants. During the data sense-making process, I was compelled to follow up on some participants for clarity.

3.6 Data collection

The data collection in qualitative research involves the use of multiple sources of data such as observations, interviews, objects, audiovisual materials and documents (Leedy & Ormrod 2010). This study used semi-structured interviews to collect data about the experiences, opinions and feelings of the former middle school HoDs.

The use of semi-structured interviews enabled the researcher to ask the standard questions with each respondent and to obtain clarification by probing the interviewees' reasoning. In semi-structured interviews the researcher asked each participant the same questions but also has the freedom to probe in order to obtain clarification. Semi-structured interviews were deemed suitable for the purposes of this study as they allowed the researcher an opportunity to probe or ask follow-up questions in order to elicit information that had been forgotten and required jogging the memories of the participants concerned (Leedy & Ormrod, 2010). The researcher conducted semi-structured interviews with the former middle school HoDs who had experienced school mergers. Since all the participants lived and worked in the Mafikeng subdistrict, the researcher arranged with each participant to conduct the interviews at the participants' workplaces after hours or at any other suitable venue and time convenient to them. During the interviews, with the permission of the participants, a tape recorder was used to record all the interview responses. Leedy and Ormrod (2010) are of the opinion that it is important for a researcher to record the responses verbatim. Handwritten notes were also used to capture everything the participants said.

3.7 Data analysis

According to McMillan and Schumacher (2006:364), qualitative data analysis is primarily an inductive process of organising the data which has been collected into categories and identifying patterns between the categories. The interview recordings were transcribed as soon as possible after the interviewees while the interviews were still fresh in the researcher's mind. Inductive qualitative data analysis was used to analyse the data. Qualitative analysis is a relatively systematic process of coding, categorising and developing patterns (Leedy & Ormrod 2010). In this study, as suggested by McMillan and Schumacher (2010), the data was analysed using the following steps, namely, data collection, data organising, data transcription into segments, data coding, data categorisation, development patterns and data preparation and presentation.

3.8 The trustworthiness of the study

McMillan and Schumacher (2010:102) maintain that a study's findings may be said to be trustworthy when they are found to 'approximate' reality. Trustworthiness in this study could be measured by how accurately the study reflected the participants' meaning of school mergers and how such school mergers had impacted on their roles as HoDs (Cohen et al., 2011).

3.8.1 Credibility of the study

Credibility refers to the correspondence between what the participants in a study have said and how the researcher portrays their viewpoints. Golafshani (2003) defines credibility in the research context as the term that is used in qualitative research to refer to the "internal validity in quantitative research". It concerns the truthfulness of the findings of the inquiry. As suggested by Creswell (2012), the researcher ensured the credibility of this study in the following ways, namely, triangulation; member checking; peer debriefing and an external audit. According to Golafshani (2003), triangulation refers to the use of more than one method or participants and groups in a study. Thus, in this purpose, HoDs who had been directly affected by school mergers were interviewed and documents related to school mergers were analysed (i.e. policies, guidelines etc.).

In addition, member checking was carried out. As suggested by Golafshani (2003), member checking refers to a process whereby the researcher asks the participants to review and critique the data for accuracy and meaning. Two participants were asked, in writing, to check the accuracy of the research report in order to check whether the researcher's description of their accounts was complete and realistic, whether the themes to be included in the report were accurate and, lastly, whether the researcher's interpretation was fair and representative. In addition, in line with the recommendations of Cohen et al. (2011), documentation on the research methods and procedures followed are available for public disclosure, thus enabling audit trail.

3.8.2 Dependability

Dependability is a term which is used in qualitative research to refer to the extent to which disparities may be explained or tracked. In quantitative research dependability is termed reliability. Golafshani (2003) suggests that dependability could be achieved through an audit trail. It is, therefore, deemed to be ethical to preserve all transcripts, notes and audiotapes so that it would be possible to refer to them in the future, should it be necessary. It is also highly ethical to present all

perspectives equally and to enable the readers to arrive at neutral decisions (Creswell & Miller, 2000). According to Cohen et al. (2011), it is also extremely important to guard against power relations by treating the participants as partners. In addition, the possible impact of the researcher's own experiences and biases that may have influenced the researcher's interpretation of the findings was taken into ethical consideration while the researcher also ensured that he did not ask leading questions. Finally, the researcher ensured that there was alignment between the interview questions and the research questions, thus enhancing the dependability of the study findings.

3.9 Limitation

The sample size was too small to allow generalisation and, therefore, the findings applied to the sampled population only. The sample was due to both time and financial constraints and, hence, the qualitative research approach to the study. This led to the researcher generally not focusing on sample size but rather on sample adequacy and, thus, it was not the researcher's intention in this study to generalise the study findings. The adequacy of sampling is usually justified by the reaching of data saturation (Bowen, 2009) which qualitative researchers regard as an indication of quality (Guest et al., 2006). It is possible that some of the HoDs may have felt uncomfortable about disclosing both issues related to the North West Department of Education (NWDoE) and their own inadequacies and this may have impacted on the reliability of the findings. Accordingly, the invitation letters explicitly indicated that the respondents' views and opinions in the study were for research purposes only and not for anything else. Thus, confidentiality and anonymity were both ensured.

3.10 Ethical considerations

In order to collect data for a qualitative research project the researcher completed research ethics permission after receiving ethics clearance certificate from the University of Pretoria (Annexure C). The following were research ethics permission I embarked upon: Letter to the NWDoE (Annexure A); Approval letter from NWDoE (Annexure B); Letter to SGBs and Principals (Annexure D) and Approval letters from schools (Annexure E). Further in order to collect data for a qualitative research project the researcher's aim is to gather an in-depth account of the phenomenon in question and this may require the participants to talk about their private experiences. This implies that trust is crucial between the participants and the researcher. As

suggested by Creswell (2012), the following ethical issues were taken into account by the researcher in this study:

- informed consent
- voluntary participation
- respectfulness towards the participants
- right to privacy
- maintaining confidentiality, and
- protection from harm.

It was, therefore, highly ethical to begin each interview by explaining the purpose of the study to each participant and the role they would play. The participants were informed of their right to refuse to participate and also that they were free to withdraw from the study at any time. After consensus on participation had been reached the researcher gave the participants the consent form to sign as proof of their voluntary participation in the study.

In addition, the researcher requested permission from each participant to use the audio recorder to capture the interview as a backup for the notes taken during the interviews. It was the obligation of the researcher to ensure that he treated all participants as human beings, with respect. Furthermore, the researcher is mandated to observe the participants' right to privacy through anonymity and confidentiality. Accordingly, pseudonyms were used for both the participants and the schools instead of actual names, for example, school A and/or HoD₁. Finally, the participants were assured of their safety from harm of any kind.

3.11 Conclusion

This chapter discussed the qualitative research approach which was used to explore the HoDs' experiences, perceptions, thoughts and feelings about school mergers in the North West province. The research design, sampling, instrumentation, data collection and data analysis procedures were outlined. Finally, the trustworthiness, limitations and ethical considerations of the study were presented.

Having presented the research methodology used in the study the next chapter presents the study findings on how the HoDs in the North West province had experienced school mergers.

CHAPTER 4

RESEARCH FINDINGS

4.1 Introduction

The previous chapter presented the research design and research methods that were used in the study. This chapter discusses the study findings on how the former middle school HoDs in the North West province had experienced school mergers with an intension of gaining understanding of the successful strategies used by the HoDs in performing their roles and responsibilities after the school mergers, the challenges they had experienced and how they approached such challenges. The interviews were transcribed and the data coded, analysed and interpreted. Themes and sub-themes emerged from the data collected from the nine participants from six different schools (Schools A, B, C, D, E and F).

Nine HoDs from these schools were interviewed as participants. Four of the HoDs were from the middle schools A, B, C and D which had merged with high schools. However, the HoD from school C had moved to primary school while the participant from school D had been promoted from the combined school to an HoD post in 2016 during the merger process. He had primary and high school experience. Grade 7 learners from primary schools E and F had moved to neighbouring primary schools as these middle schools had been upgraded to secondary schools under the same HoDs who had served in these middle schools.

Participants' profiles:

Head of department 1 – HoD₁, a black female, had served as a middle school educator and HoD in the semi-rural North West province. Although she was head of the language department in a secondary school at the time of the study, she had trained as an educator at a teacher training college where she had obtained primary teachers' diploma. Although she had majored in Setswana and English she had been HOD of Setswana, Economic Management Sciences (EMS) and Social Sciences in the former middle school G. Her former middle school G was in Mahikeng, an area that was formerly part of a Bantustan, former Bophuthatswana, the majority of which was included in the North West province after 1994. The school was surrounded by poorly built houses. All the learners who attended the school were from the village about 11 km from Mahikeng town with the school continuing to serve the entirely black community.

Head of department 2 – HoD₂, a black male who had served as a primary school educator and principal in his first school in the rural area in the Ngaka Modiri Molema district in the North West province. His first school merger experience had resulted in his being deployed to middle school H where he had become HoD. The former middle school was situated in the centre of a township in Mahikeng. In his second experience of a school merger, he was moved to secondary school B which was separated by fence from his former middle school H. He had trained as an educator at a teacher training college where he had obtained a primary teachers' diploma. The secondary school B was surrounded by well built houses. All learners who attended the school come from both the nearby village and the township where the secondary school was located.

Head of department 3 – HoD₃, a black female who had trained at the former Bophuthatswana University as a high school educator. She had started her teaching career as a high school educator and had then moved to former middle school J where she had been promoted to an HoD post. The former middle school was a black, semi-rural school in the North West province. Mahikeng, the area where her school was also situated, had formerly been part of the Bophuthatswana Bantustan. The school where she was teaching at the time of the study was in the same village her former middle school.

Head of department 4 – HoD₄, a black male, had been a combined school (Grades 1–12) educator although he had been teaching Grades 10 to 12 and was qualified to teach mathematics and physical sciences at the secondary school level. He had been promoted immediately after the school merger to become HoD of Mathematics and Sciences at secondary school C. Secondary School C had been established after the school merger of former middle school K which had merged with high school D. The schools were separated by a fence. Secondary school C is a rural school located more than 15 kilometres from the main town of Mahikeng. The school is not very far off the main road and it is reached by travelling along a gravel road.

Head of department 5 – HoD₅, a black female, has been a secondary school educator, HoD and acting principal at high school D before the school had merged with former middle school K. HoD₅ had been appointed as head of the language department at high school D. She had trained as an educator at the former Bophuthatswana University where she had obtained her degree in Setswana

and Geography. She had then been appointed as head of the language department at secondary school C.

Head of department 6 – HoD₆, a black male, had trained as an educator at a teacher training college where he had obtained a primary teachers' diploma. He had first taught at a middle school and had then become HoD at the former middle school D. He had remained as HoD after the school merger when the school had been upgraded to a secondary school. The school is located six kilometres from the town of Mahikeng town. As a commercial school the school struggled to find commerce trained educators. The former middle school had been converted to commercial school because it is not far from a secondary school that offered sciences. All these schools served exclusively black communities.

Head of department 7 – HoD₇, a coloured female, had served as a primary and middle school educator in the semi-rural North West province. Although she has been head of the language department at secondary school D, she had trained as an educator at a teacher training college where she had obtained primary teachers' diploma. She had majored in Setswana and English. At the time of the study she was head of the language department at secondary school D. She was well-spoken and a diligent HoD.

Head of department 8 – HoD₈, a black female, had trained as an educator at a teacher training college where she had obtained a secondary teachers' diploma in mathematics and agricultural sciences. She had first been a primary school educator for more than ten years before she had become an HoD at former middle school F which was then upgraded to secondary school F. The school is between Botswana and the North West province on the outskirts of Mahikeng. At the time of the study the school had 462 learners from Grade 8 to Grade 12, mainly from single parent or child headed families. There were ten educators with class sizes ranging from 35 to 50. These class sizes had to be reduced to 35 per class to meet provincial norms. The secondary school is in a deep rural area of the province and offered humanities and science subjects.

Head of department 9 – HoD₉, a black female, had served for a long time as an educator at former middle school F. Shortly before the time of the study she had been promoted to an HoD post just before the former middle school had been upgraded to secondary school F in the rural North West province. According to the NWDoE upgrading a middle school constitutes a school merger.

Although she was head of the language department at secondary school F, she had trained as an educator at a teacher training college where she had obtained primary teachers' diploma. She deserved to be referred to as a "daughter of the soil" as she had grown in the area where she was still employed as an HoD at the time of the study.

Table 4.1: Introducing the research participants

Pseudonym	Site	Pseudonym MS + HS = NS	Experience as HoD	Gender
HoD ₁	A	G + A = A	13+	Female
HoD ₂	B	H + B = B	10+	Male
HoD ₃	C	I + J = I	4+	Female
HoD ₄	D	K + D = C	3+	Male
HoD ₅	D	K + D = C	15+	Female
HoD ₆	E	E + Q = E	8+	Female
HoD ₇	E	E + Q = E	7+	Male
HoD ₈	F	F + L = F	5+	Female
HoD ₉	F	F + L = F	3+	Female

Key: HoD = Head of department; MS = Former middle school; HS = Former high school and NS = New school

4.2 Data analysis process

Data analysis includes the process of creating logic from data (Merriam, 2005:178). The oral interviews which had been conducted were transcribed into text. The newly attained data were compared with the existing categories and patterns between them identified from the literature. The interview data was coded by grouping the responses of the participants into the themes and sub-themes that had been discovered. The document analysis involved examining the school

merger documents from the schools and the NWDoE to establish the roles and responsibilities of the HoDs during the middle school mergers.

4.3 Interview analysis

The results of the study emerged from data presented below. The participants responded to the interview research questions:

- What do you understand by the concept of school merger and the reasons attached for it?
- What role did you play in the school mergers process?
- How have school mergers affected your role as HoD?
- What challenges did you experience in performing your role after displacement?
- What support did the HoDs receive to help them to cope with their displacement?

4.3.1 Definition of and reasons for school mergers

It was clear from their responses to the question *“What is it that you understand about school merger?”* that the participants in the study had each attached his/her own meaning to what a school merger meant in his/her own terms. However, the majority of the HoD participants understood a school merger as meaning the bringing two or more schools together. They were of the view that this definition of a school merger included the merging of the human resources, namely, educators and learners. HoD₁ defined a school merger as *“bringing schools together, in other words, merging the resources, the resources meaning educators, learners and everything”*. In the same vein HoD₆ commented that *“A school merger is to try and streamline our schools”* while HoD₂ responded that *“they are closing middle schools, incorporating middle schools into primary and secondary schools”*. According to HoD₄, *“The DoE actually wanted to get rid of the middle schools, they just wanted to have primary and secondary schools”* while HoD₇ indicated that a *“merger is creating secondary and primary by killing middle schools”*.

In line with the opinion expressed that bringing two schools together constitutes a school merger, other participants viewed it in a similar manner to the previous participants but expressed it differently. Recalling her experience of a school merger, HoD₅ mentioned that, *“Well, I can’t say*

I really understand what a school merger is. What I can say is that it is the process of combining two schools where each member of the staff played his or her role in the teaching fraternity” while HoD₈ commented that “We now have only one component which is a secondary school in one. Remember first we had middle and secondary schools running apart.” HoD₉ stated “It’s combining the grades, either from the primary, the middle, the high school, but. Really, it is a confusing ideology”.

Based on the participants’ narratives on their understanding of the concept of a school merger, the following three categories: Firstly, there were those who view school mergers as abolishing middle schools with the intention of having only primary and secondary schools in the province, secondly, those who had defined a school merger as a combining of two schools but a process to which they had not paid much attention because, as staff, their focus was on the teaching and learning and, thirdly, those who appeared to still be confused by what was happening in their province. For example, although they had observed a type of combining process taking place, at the time of the study they still could not understand whether it was is taking place in schools or in grades. Thus, this finding indicated that the HoDs who participated in this study had never been part of the planning and nor had they been informed about the school merger process in the province. In other words, the HOD s had clearly never been involved in the planning of school mergers in the North West province.

Furthermore, as they responded to the question “*why school merger?*” the HoD participants cited various reasons for the school mergers in the North West province in their own terms. The majority of them, however, expressed the view that the DoE had intended that the big learning institutions cut costs and the main reasons for the school mergers included the decrease in learner enrolment the streaming of schools according to curriculum offering with the DoE were creating a primary and secondary schooling system. HoD₁ gave the reason for the school mergers as “*The department just wanted to make just one big learning institution, cutting their costs*” while HoD₈ expressed a similar view, namely, “*School mergers mean both middle school and secondary will be running concurrently with one principal, starting from Grade 8 to Grade 12. Which means we had to... sort of bring together both middle and high school*”. According to HoD₇, “*The idea was to look for the need for the curriculum with the two school levels offering different subjects*”.

HoD₃ stated that “*perhaps the government got something out of this whereas we, as educators and learners, we don’t benefit*” while HoD₂ commented that “*One, having suffered the drop-in roll although our school never had a problem, they just wanted to kill middle schools*”.

“People in the former Bophuthatswana seem to be the ones who still had three phases, namely, primary, middle and high schools. Looking at things in other provinces, SA is going for two phases, namely, secondary and primary and probably the government does not want to pay many principals, so they are grouping the schools so as to save money to avoid paying many principals” (HoD₅).

Based on the above discussions, two categories emerged from the participants’ narratives with some of the participants perceiving that the cutting of costs was behind the school mergers whereas others perceived that the initiative is a strategy on the part of the government to enrich themselves. It was not surprising that the HoDs in this study had different perceptions of the reasoning behind the school merger in the North West province. It is possible that this was the result of a lack of proper information.

In conclusion of this subsection, it is important to mention that, although it was not surprising that the HoDs had expressed different understandings and interpretations of the concept of school merger, it was evident that their definitions were informed by their observations rather than information communicated to them. They observed, firstly, that, at the time of the study, there were no longer middle schools but only primary and secondary schools in the North West province and, secondly, that they had been directly affected by the process by being moved from one school to another and, in some cases, changing positions. Their narratives also revealed two motives behind the school mergers, namely, cost cutting and corruption on part of the government. It was, therefore, concluded that, due to the lack of communication and the non-participation of the HoDs in the planning of the school merger initiative, the HoDs who participated in this study viewed school mergers in the following three ways:

- (a) Disappearance of middle schools and absorption into primary and secondary schools
- (b) Their (HoDs) displacement from one school to another
- (c) Their change of positions i.e. from HoD to educator

To them the school mergers had been driven by (a) cost cutting and (b) corruption on the part of the provincial government.

4.3.2 Role HoDs played in the school merger process

In their responses to the question “***What role did you play for you to be prepared in the process of school mergers?***”, the overwhelming majority of participants mentioned that inadequate preparation had impacted negatively on the implementation of the school mergers. They also articulated a common resentment towards the short-lived, “smash and grab” type of preparations while the documentation did not provide any indication of the role played and expectations of HoDs in the school merger process. It emerged from the data that had been collected that most of the preparation had lasted for one year to two years and had comprised quarterly meetings with the subdistrict task team responsible for the reform implementation. Likewise, the empirical evidence revealed that most of the preparation meeting conducted had not addressed the issues of the job security and the capacity of the HoDs. HoD₅ stated that “*It started in 2012 when they said we should not admit learners in the high school so the roll was shrinking until 2015 when we were instructed to merge by moving to the middle school but no documentation*” while HoD₇ commented that “*They gave us the documents to go through but the documents said nothing about our expectation as HoDs. According to (HoD₉), “It was confusing from scratch, frustrating, we had to convince the principal “No, don’t allow the school to be closed, don’t ...let’s not go to primary, let’s go to secondary” – no documentation*”. HoD₂ said, “*We had two to three meetings a month, meetings started in... 20... 2015 (clearing his throat) 2015, yes, and started moving in 2016. They gave us the documents to go through but they said nothing about our expectation as HoDs*”. HoD₁ mentioned, “*We had a series of meetings on what was expected from us for a period of two years. The documents said nothing about my HOD job or about my expectations as an HoD. The document was silent about my work*”. In a similar vein, this is what was also said,

We had some pamphlets which showed us that we are not going to lose our jobs. Is either when the school is merged let us say maybe it becomes a primary or close the school was that if they close the school. The principal would be parked somewhere, and the teachers will be taken to other schools. If maybe our school is upgraded no teacher who will lose their job (HoDs).

The interview data revealed that the middle schools had evidently had the option of being closed or else downgraded to a primary school or upgraded to a secondary school as was also indicated in the document analysis (DoE, 2012–2016:15). However, two discrete reasons emerged: some former middle schools were allowed to upgrade to secondary schools during the school merger while others were denied this. Firstly, there were those middle schools which had applied for an extension of the curriculum (upgrading) and the department had refused and, secondly, in the same district NMM there were those middle schools that were informed they could upgrade to secondary schools and were encouraged to extend the curriculum. HoD₂ stated, *“We were not given the chance to extend the curriculum. They literally refused to give us the chance when we applied. No reasons given – even today I personally asked”*. However, HoD₃ commented, *“We were told that we had the option of merging or upgrading. They explained to us the advantages and disadvantages of merging”*.

In conclusion, it is important to mention that it was normal for the HoDs to experience hostile feelings towards school merger as the NWDoE failed to prepare them for their new roles and expectations in the new schools. Firstly, it was evident that their hostile feelings were the result of their negative experiences of school mergers which had been characterised by short-lived, “smash and grab” type of preparations on the part of the NWDoE. They felt that the DoE in North West province had undermined them and had also not prepared them for the school mergers. Secondly, the relevant DoE documentation had not given direction on the role and responsibilities of HoDs in the school mergers. Thirdly, those HODs who had experienced their middle schools being upgraded to secondary schools had experienced difficult transitions with no help from the DoE. Fourthly, some HoDS were still confused as the NWDoE had refused the applications for curriculum extension. For example, they had observed some middle schools being upgraded to secondary schools and they could not understand why their applications to do the same had been refused. It was, therefore, concluded that the lack of monitoring and support of HoDs by NWDoE in the initial stage of school merger had led to hostile feelings towards their preparation; role they did not play in school merger; awful transition after upgrading to secondary and not being allowed to upgrade to secondary. The HoDs who participated in this study highlighted four aspects about the school mergers they had experienced:

- (a) Short-lived, “smash and grab” type of preparations

- (b) Role played by HoDs undocumented
- (c) Appalling transition when upgrading to secondary schools
- (d) Refusal to allow upgrading to secondary schools

4.3.3 The effects of school merger on the HOD role

It was clear that their responses ***“How did the school merger affect you?”*** were linked to the variable of professional identity change. The study revealed that the organisational climate at almost all the research sites had been contaminated by high levels of emotion in relation to job insecurity with these emotions emanating from the school mergers and the ongoing redeployment of teachers in terms of the ELRC Resolution 2 of 2003 with HoDs being eligible for redeployment if they have been identified as being in excess of or additional to the number of staff required in their merged schools. Several participants revealed that the insensitive execution of the school mergers had led to feelings of uncertainty, job insecurity, low morale, anxiety, disillusionment and frustrations among the HoDs. HoD₉ stated, *“Really, psychologically no one wants to leave if you are comfortable in your school, we’ve built this school, we’ve built everything... emotions are embedded here in our school. So, now, if somebody says you must go to another school”*. In the same vein HoD₁ commented, *“You know that I cannot come to your school and be free, I’ve got to adapt to the situation which is difficult”* while HoD₅ said, *“There is really a lot involved in our case because we merged with people who did not accept us to start with... They did not accept us and the government knew it but the government insisted that we merge”*. According to HoD₃, *“The teachers were allocated classes and everything... what they had to do. And then those in top management, the SMT, we were left hanging because the PPM and Redeployment would come to the fore and then some of them would lose jobs”*. Likewise:

You see, personally, I would say it is still bad, there was a time where I went almost eight months without working and not having allocated duties. The process of merger, it was frustrating to me as I felt as if I were losing my job because this is... there is no certainty there. People, people felt that their job was being taken away. You see, because people were not sure about what is going to happen, because people could not interpret this policy properly. People did not know what was going to happen really. They left the school based on the merger (HoD₂).

It was clear from the effects of the mergers that these heads of departments that many felt strongly that the DoE left the process of the school mergers to the school principals. As a result, proper placement had not been done and, thus, both during and after the process many HoDs had resigned while others had been displaced. The study found that the majority of the participants wanted to change schools. HoD₈ commented, *“I was negatively affected but, you know, that coming to a new work environment I thought I’m going to lose my work. I was working under pressure and there was a time where I felt like resigning”* while HoD₆ stated, *“Others said ‘No, I don’t think I can make it into primary’, others resisted the change, others just adjusted, others even thought of moving away from the school but the question was where to now?”*. HoD₇ said, *“They went to other schools and, mostly, if not all of them went to primary schools”*.

They did know what to do with us because there was a principal there and we came with our principal. There was a deputy, we came with our deputy. There were HoDs there, we came... we were also there and you know the issue of PPM. I had to look for a school myself. I even had to go to the circuit office to see if there were available posts and I was told I would be informed if any school were found. I’m a secondary qualified teacher but I’m here in a primary school and the other HoD went to the nearby primary school. But being in a primary school is a... challenge because I haven’t done child psychology (HoD₃).

The study further revealed that the HoDs were of the opinion that there was a need for counselling and that the North West DoE should offer therapy to the HoDs who had been affected by the closing of the former middle schools to assist them to address the issues of uncertainty, job insecurity, low morale, anxiety, disillusionment and frustrations they were experiencing. Speaking eagerly speaking HoD₅ said, *“Reduce the emotions HoDs are feeling after the merger and HoDs who are resigning due to the mergers to help us to cope”* In the same vein HoD₄ said:

If counselling is needed, then let them counsel everyone then says this is how we are going to do this and ask all of us if is there anyone who wants to change schools. Then take you from point A to point B, for example if you have done primary and say no, according to my qualifications I have done primary, so I have been wrongly allocated so send me to a primary because this is what I have studied... I have majored in ...

The interview data further revealed that the majority of the participants had also perceived that ‘the assumption that an HoD from a middle school will be an HoD in a secondary school or a primary school’ as another constraint. HoD₁ stated, *“I was appointed to be the HoD of Grade 7 to Grade 9. I was not appointed; just told to be HoD for Grade 8 to Grade 12 now. Volume of work from Grade 8 to Grade 12?”* Similarly, HoD₃ commented, *“I wasn’t trained to be a primary school teacher. I was an HoD in a middle school but, during the school merger, the department assumed that I could manage or be HoD in a primary school”*. Some of the participants mentioned that a lack of relevant subject knowledge in relation to the curriculum or syllabus coverage had also impacted negatively on their work as HoDs. HoD₁ stated, *“I’m just an HoD who wants the syllabus to run and be completed but then, the end product is not what one can say is desirable due to a knowledge gap on my part”*. In a similar vein the following comment was made,

I am worried about these commercial subjects where we don’t have a HoD and I’m the HoD but we expect the educators to be monitored and to deliver as expected. I don’t know anything about commercial subject especially monitoring and supporting Accounting. The educators are not taking my support seriously and they blame me for the underperformance of the department (HoD₆).

In concluding this subsection, it is important to mention that it was normal for the HoDs to have experienced various feelings and voiced varying opinions on the different ways in which the school mergers had affected them and, in particular, how they had affected their roles. Their feelings included uncertainty, job insecurity, low morale, anxiety, disillusionment and frustration. In addition, the DoE had left the school merger process to the school principals and the DoE had not managed the process. The former middle school HoDs had been directly affected by being moved from one school to another and, in some cases, changing positions. Therefore, counselling is urgently needed as they felt displaced. The assumption by NWDoE that an HoD from a former middle school can assume the role of HoD in a secondary school aggravated the effects of school merger on their HoD role. Their narratives also revealed two scary aspects that led to them feeling displaced. Firstly, the competition among the HoDs from former middle school and the HoDs from high school for the existing posts according to post provisioning model (PPM). Secondly, the qualifications needed for the HoD post in a secondary school as most of them had qualified as primary school educators. It was, therefore, possible to conclude that the lack of involvement on

the part of the NWDoE and insensitive way in which the school mergers had been executed had led to high levels of job insecurity among the HoDs. The HoDs who participated in this study revealed four salient points in relation to the impact of the school mergers on role of the HoDs:

- (a) Despondency among the displaced HoDs
- (b) Principals responsible for school mergers
- (c) Counselling advised for displaced HoDs
- (d) Assumption that HoDs from former middle schools could take on the role of an HoD in either a primary or a secondary school.

According to them, the points mentioned were driven by (a) competing for post/redeployment and (b) qualifications.

4.3.4 Challenges HoDs experienced in performing their roles after displacement

As they responded to the question ***“What challenges are you experiencing in performing your roles after displacement?”*** all the participants unreservedly shared the same sentiment that the school mergers had drastically challenged their roles as HoD. The majority of the HODs who participated in the study were from former middle schools with only two from former high schools, but they all lamented that their role was to teach and administer only three grades, namely, Grades 7 to 9 and for Grades 10 to 12. The findings showed that, generally, after the school mergers, they were responsible for two additional grades which impacted on their workload, roles and responsibilities. HoD₆ said, *“My role is challenged in this way...there is a lot of responsibility because I take subjects that are offered to some of the learners that I didn’t even know about before, for example, tourism as a subject and also the addition of two grades”*. HoD₂ commented, *“I have to manage English, Life Orientation and Creative Art now ... all from Grade 8 to Grade 12. It is very tough for me having to manage from Grade 8 to Grade 12 with the addition of a subject I am not qualified to teacher”*. He went on to say, *“Having classes to teach, not simple. Remember I have 15 teachers in my department and some of which have with two files, thus 21 files and my own classes as well. I have to monitor those teachers’ three subjects: Life Orientation, English and Creative Art”*. In a similar vein HoD₅ commented, *“Now I administer, moderate and observe the whole school from Grades 8 to 12. I have five grades now; the work has increased. Unfortunately, I also have to teach both English and Setswana alone and I normally used to share*

it with somebody". HoD₅ stated, "As a high school teacher, I'm used to teaching Grades 10 to 12. Now, in secondary school, at some point you are forced to teach Grades 8 and 9 and in subject you don't know and it is difficult". HoD₃ from a primary school remarked:

I'm a secondary qualified teacher but I'm here in a primary school which is divided into foundation phase and interphase. So, foundation phase R, 1, 2 and then interphase 4, 5, 6 and 7. I am doing interphase 4, 5, 6 and 7. In the interphase, we have two HoDs so we share the subjects. I am doing Life skills, Social Science and English but for all the grades. The problem is that I have to head some subjects that I know nothing about, like Social Science.

Based on the teaching and administration as alluded to these heads of departments, it was clear that they shared the opinion that the North-West DoE had changed their workload, role and responsibilities after the school mergers. In addition, the study found that they were unable to improve the classroom teaching and curriculum, plan professional development, make departmental decisions and supervise the teaching, mentoring and guiding that influenced daily operations which were all part of their roles after the school mergers. HoD₂ commented, "I'm the most affected and challenged HoD. I used to do Life Orientation and Creative Art as a subject for Grades 7 to 9, you see" and continued, *Now I have had English FAL from Grades 8 to 12 added. How do I support, supervise and develop the educators in my department when I'm struggling to teach at a higher level and also teach a subject I am not qualified to teach?* In a similar vein:

I was teaching and doing observations, moderation and monitoring Setswana and somebody was doing English. I was only doing Setswana but checking the whole department. Now both are offered in the GET phase and the FET phase and I have to do them all for both these phases. This is a lot of work so how do I also improve the teaching and guide my educators (HoD₉).

The data which had been collected revealed that the HODS were having to teach and administer subject they did not know and for which they were not qualified. The teaching issues included a lack of subject knowledge on the part of some of the HoDs, and a lack of curriculum knowledge on the part of some of the educators which was resulting in resistance on the part of educators and this was leading discomfort and discouragement on the part of most of the HoDs. HoD₉ said, "I am teaching all the grades (Grades 8–12). This is what an official told us 'Your certificate is not

qualification for middle school, either primary school or secondary school and you will study like these children' and it is true". She added, "It affected me a lot because really ...aa, I don't sleep really, we don't sleep because is Grade 8 up to Grade 12. We are teaching all these grades and it is even affecting the learners". Similarly, HoD₄ remarked, "Educators have to upgrade to Grades 10, 11 and 12 but they refuse. The majority are those from middle schools and they resist or refuse to teach these grades. Then it creates problems due to PPM". HoD₅ (from the same school) stated, "I informed the educators from the middle school about the policy that tasks and tests must be submitted within in three days for checking and capturing on the computer – 900 learners with two languages. There is just pure resistance or defiance from the educators". One HoD summed it up as follows:

I think, if you are an employee, for you to be productive you must be motivated to do what you are doing so I will generally say most of us, almost everyone, is not as productive as is expected. Because of the merge actually everyone is demoralised ...yah, and by saying demoralised I mean it has affected me a lot when we were supposed to be motivated (HoD₄).

In view of the way in which the school mergers had resulted in work challenges for these heads of departments, the majority of them voiced the opinion that, by closing the middle schools, the North-West DoE had promoted a lack of curriculum knowledge, discomfort for the HoDs and resistance from the teachers. However, despite how seven of the participants clearly felt about teaching and administration (leading to resistance and demoralisation), the other two participants from the secondary level obviously felt that the school mergers had not affected their work despite the fact that time and syllabi coverage were challenging their role as HoDs. HoD₁ said, *"The time allocation was not the same in GET (30 to 35 minutes) but, in FET, up 50 minutes to an hour. In FET we would finish our work ... syllabi, marking and everything. In GET it is quite the opposite".* In a similar vein HoD₇ commented, *"We are no longer operating in the same way as in the middle school. Here we are supervising the matriculants, educators, afternoon classes, Saturday classes and the issue of camps. One can feel that there really is a change".*

They further alluded to the fact that more attention was paid to the Grade 12 syllabus and to FET (Grades 10–12) while GET (Grades 8–9) was neglected, thus resulting in concern about their work. The data revealed that the ATP and PoA for both GET and FET were not aligned and that even

the notional time allocation for each subject per phase was different which was affecting their work. HoD₁ indicated, *“The department is failing us in a way because, if you look at the programme of assessment, it is not the same. The time allocated is not the same. GET includes many activities, many formal activities as compared to FET”*. She further said, *“So, the ATP is failing, we move according to the ATP and then, come exam time, the FET timetable for trial and final examination will be given to learners two to three weeks before the GET timetable. GET would not be taught”*.

Based on the participants’ narratives on the way in which the school mergers had changed their roles as HoDs, one category of participant views emerged, namely, that they viewed the school merger as having drastically changed their workload, role and responsibilities as HoDs, to the extent that they were struggling with their teaching and administration. According to the HoD working in the high school and those from the former middle schools, they were unable to improve their classroom teaching and curriculum, plan professional development, make departmental decisions, supervise teaching and mentor and guide the teachers. All these factors impacted on the daily operations in the merged and upgraded schools. However, the HoDs in this study had never attended workshops on dealing with their workload, roles and responsibilities either before or after the school mergers in the province. In other words, both before and after the implementation of the school mergers in the North West province, the HODs had not received any training.

Based on the participants’ narratives on the way in which the school mergers affected their work, three further categories of participants’ views emerged. The first category comprised those who were of the opinion that the school mergers had affected their teaching and administration due to their lack of subject knowledge on the subjects they had to teach and administer while the second category referred to the observation that the combining of two schools had affected both the time and syllabi coverage for both FET and GET phases. The third category comprised those participants who felt that more attention was being paid to Grade 12 and FET than to the GET classes. These school mergers triggered resistance on the part of educators. According to the HoDs who participated in the study, they had never been given a choice as to the level they were to teach and administer during the school merger process in the province. In other words, there had not been any profiling of the HoDs during the planning of the school mergers in the North West province.

In conclusion to this subsection, five views as to the way in which the school mergers had affected their work emerged from the participants' narratives. The first category comprised those HODs who maintained that the school mergers had affected both their teaching and their administration. In addition, they were being forced to teach and administer subjects they did not know and for which they were not qualified. The second category comprised those who had observed that the combining of two schools had exposed a lack of subject knowledge on their part and on the part of some of educators from the former middle schools, thus resulting in their experiencing difficulties in managing these subjects. The third category included those who felt that the notional time and syllabus coverage constituted problems while those in the fourth category were of the opinion the lower grades were being abandoned. These all culminated in all the HoD respondents agreeing with the fifth view, namely, that the school mergers had resulting to drastic changes in their workload, roles and responsibilities. In addition, the HoDs in the study had never been given a choice as to which level they were qualified to teach and administer as their roles and responsibilities during the school merger process the province. In other words, there had been no profiling of HoDs in the school merger planning in the North West province. The work of the HoDs who participated in this study had been affected in the following five ways:

- (a) Leading and teaching
- (b) Content gap
- (c) Notional time and coverage of syllabi (GET and FET)
- (d) Lower grade being abandoned
- (e) Changes in workload, role and responsibilities

According to the HODs the phenomena listed above had been driven by a lack of profiling and training of the HoDs by the provincial government.

4.3.5 Support for the HoDs to enable them to cope with displacement

Closely linked to the issue of support for the HoDs was the way in which the HoDs had been received/welcome in the new schools after the mergers. It emerged from their responses to the question ***“What type of support did you receive and from whom, and how were you welcomed in the “new school” as an HoD?”***, that the participants in the study had each attached their own meaning to the way in which he/she had been received/welcome in his/her “new school”.

It was clear throughout the empirical study that the participants from schools A, B, C and D were dissatisfied about their welcome/reception in the schools to which they had been deployed. According to them, the unwelcoming behaviour had created the animosity which existed between themselves and the receiving schools. The study discovered that this unwelcoming behaviour on the part of the receiving schools which had created the hostility among the educators were due to the competition of posts and exacerbated by the feeling of job insecurity emanating from the ongoing redeployment of teachers in terms of the ELRC Resolution 2 of 2003. HoD₂ said, *“We were supposed to be given departmental support, departmental caring and departmental welcome because it was a totally new school”*. Likewise HoD₁ commented, *“It was just a very cold (laughing) reception. “People tend to ‘judge a book by its cover’ as I come from former middle school they don’t know your capabilities and they are threatened by your presence”*. HoD₅ stated, *“Even the teachers did not accept us. On a professional level... the principal, HoDs, educators and staff generally, they did not accept us. They acted in a hostile way towards us and, as for the teachers... just worse”*. Another HoD from the same school remarked, *“Actually, we need to tolerate each other and accept that this merge is happening there, and we have to work together as a team”*. In a similar vein HoD₃ said, *“The welcome/reception wasn’t very good, the teachers and SMT were feeling edgy, threatened by the PPM and redeployment. We were hoping to see officials welcoming us, giving us directions and support. The hostile reception was because they were afraid of losing their jobs”*. HoD₂ blamed the department for not receiving them and said blandly, *“In the merger, there is a group from one and a group from another school coming together. We expected the department to welcome us, give us direction and support. I blame them”*.

It was also revealed that participants from schools E and F were dissatisfied about their welcome/reception into the secondary/FET level on the part of the DoE with the department not accompanying through the transition of moving from the middle school into the secondary school from the very first day but that there had been goodwill among the staff. HoD₈ remarked, *“They did not introduce or welcome us to the new secondary school. They should have prepared us so we would know what we would be going through with the merger between GET and the FET but, as a team, we are pulling in opposite directions”*. HoD₇ stated, *“We were not guided; we were not received into the secondary school. The merger was not based on human resources such as who do we have to teach such and such a subject as they just agreed on my deployment to a commercial secondary school. I expected support from our department”*.

Based on the participants' narratives on their reception/welcome into the "new schools" after the school mergers, two categories of participant views emerged. Firstly, there were those who viewed their reception/welcome into the "new schools" in the light of unwelcoming behaviour which had created animosity between themselves and the receiving school. The second category comprised those who were dissatisfied about the DoE's welcome/reception of them into the secondary/FET level. For example, they had been upgraded into secondary schools and they could not understand why the department had not taken them through the transition of moving from a middle into a secondary school. The HoDs in this study had never been welcomed/received into the receiving schools while some others had never been inducted in relation to their upgrading into secondary schools during the school merger process in the province. In other words, it seemed that the DoE had not been at all involved in the implementation of the school merger process in the North West province.

The empirical study revealed that the displaced HoDs had never undergone any professional development. The study showed that the HoDs were facing challenges in respect of improving classroom teaching and curriculum, planning professional development, making departmental decisions, supervising teaching and mentoring and guiding teachers. According to HoD₇, "*There was no professional support, the PSFs did not help me to resolve issues relating to teaching and understanding the curriculum, all the more so in the subjects I don't know. I am experiencing in mentoring and guiding teachers in these subjects.*" HoD₄ summarised the issue of support as follows:

Sometimes I feel, aa... demotivated because now teachers are relying on me but I don't have the capacity to assist and support teachers by mentoring and guiding. I was not mentored, capacitated and guided in my difficult transition. I must mentor and guide my teachers because our teachers are not, were not used to the type of programme of assessment, ATP and teaching that happens in a secondary school. So, the school had to look for people with experience to come and to assist but I have to rely on the neighbouring secondary schools to assist the teachers.

The empirical study revealed that the HoDs had never received support in relation to mentoring them, arranging professional development for them and guiding them. All the participants from

schools A to D indicated that they had not been supported by the receiving schools, circuit and district. The same sentiments were shared by all the participants from schools E and F, namely, that they were not supported by the circuit and the districts and that this resulted in difficult transitions. HoD₉ remarked, *“The only thing that has enticed us to upgrading to secondary, that at least they will be helping us. But we never got any help from those people... from the department, I meant to say, they never supported us”*. HoD₈, from the same school, commented, *“The DoE never came and said, ‘This is how we are going to start; this is what we are going to do, this is what expect from you as teachers in this school’. But we were alone... we were frustrated and alone”*. HoD₁ stated, *“Thanks to us we succeeded without support from the NWDoE. We had to fend for ourselves as educators and the officials didn’t come. I thought the officials should have come but they were silent”*. With practical understanding HoD₃ said,

A lot of transition for me and there was no support. I mean, I’m from a middle school and I’m coming to primary school. Let me give you one scenario – one day during break I was sitting in the office eating and the principal came to me and said (loud voice) ‘In primary school you don’t sit around like that during break. You go around, that is called ground duty. We take care of the learners outside during break’. I didn’t know. I had to be told. So, you see, the things I had to learn as I go and the hard way. You were never... orientated. I didn’t get any support from anybody. I was just dumped... thrown into the school and giving everything to work. So, I was not supported, I had to cope on my own (HoD₃).

It is clear from the above discussions that one category emerged from the participants’ narratives, this category comprised all the HODs who expressed the view that the school mergers had involved a hostile transition for the HoDs from the former middle schools to into either primary or secondary schools. Nevertheless, despite the difficult transition they had had to accommodate extra new subjects. They had not received any support from the receiving schools, the circuit and the district with no support in the form of mentoring, arranging professional development for them and guiding them in the initial and post stages of the school mergers as well as no support in respect of any of the subjects they had to teach, including those unfamiliar to them. All HoDs in this study demonstrated almost the same perceptions of their support from the receiving schools, circuit and district.

In concluding this subsection, it is important to mention that, firstly, although it was normal for the HoDs to have experienced a common hostile feeling towards the preparation, welcoming/receiving and support they had been given during the school mergers, it was evident that these hostile feelings were the result of them being targeted by school merger process to disband middle schools in the province. Secondly, they felt that the DoE should have assisted them in the transition of upgrading from middle into secondary schools. Thirdly, since they had been directly affected by the same process by being moved from one school to another, they had all experienced challenges in relation their classroom teaching and curriculum, planning professional development, making departmental decisions, supervising teaching, mentoring and guiding teachers. Fourthly, their narratives revealed two motives behind the unwelcoming behaviour towards them during the school mergers, monitoring and mentoring on the part of the DoE. It was, therefore, concluded that the lack of monitoring and support for the HoDs by the DoE in the initial stage of the school merger process had led to the hostile feelings they had experienced in respect of the preparation, welcome/reception and support they had received during the school mergers. The HoDs who participated in this study mentioned three aspects in respect of the school mergers:

- (a) Unwelcoming behaviour
- (b) Appalling transition when upgrading to secondary schools.
- (c) Lack of professional development

4.4. Document analysis

The following documents used for school merger were received from the North West DoE:

- Guidelines for Rationalization Re-alignment of Public Schools: A Holistic Approach, August 2017 which is an updated and better vision for
- Guidelines on the School Rationalisation Process, August 2014.

They both give understanding, reasoning, and implementation of school merger. The final document, which is,

- Update report on Rationalisation of schools, August 2017 gives the successes and failures of the implementation of school merger.

In order to determine the understanding of school merger and reasons thereof by displaced HoDs. Secondly, the role displaced HoDs played for their classification and placement in the process of school merger. Finally, the support HoDs get to cope with displacement.

4.4.1 School mergers and reasons for the school mergers

The purpose of perusing the relevant was to ascertain, firstly, whether the HoDs' understanding of the school mergers and the reasons for such mergers was in line with what was contained in the documents. The absorption of middle schools into primary and secondary schools was, indeed, in line with the Guidelines on the School Rationalisation Process (DoE, August 2014:3). According to the document, schooling should comprise eight years of primary schooling (Grades R–7) and five years of secondary schooling (Grades 8–12) with the former middle school being merged with primary or secondary schools or else closed. The reason advanced for this was that the state contributions to education, including personnel costs, are calculated based on learner numbers.

4.4.2 Role played by HoDs

The purpose of perusing the documents was to ascertain, secondly, the roles the displaced HoDs had played in their classification and placement during the school merger process. The study revealed that the HoDs had played no role in the school merger process and that they had had to comply with the implementation of school merger process. In none of the schools in the study had the HoDs been involved in the preparation for and implementation of the school mergers. In both provincial and national guidelines on school merger the classification and placement of HoDs according to their qualifications was a mandate for the departmental officials from the subdistrict and the district to implement (DoE, 2014 & 2017). However, none of the schools (HoDs) in the study indicated the correct placement of the HoDs. Thus, the post provision model (PPM) resolution for rationalisation is used to resolve staffing problems by getting rid of the displaced HoD (DoE, 2014:4)

4.4.3 Support given to HoDs

In addition, the NWDoE guidelines on the school rationalisation process indicate that the counselling, mentoring, and development of HoDs should be scheduled by DoE to last for two years (DoE, 2014; 2016). However, this study revealed that, to date, the displaced HoDs had never received support from the schools, circuit or district during the merger period.

4.4.4 Minutes of the SMTs and task team

The aim of examining the minutes of the SMTs and subdistrict task team on school merger was to establish the role played by HoDs and their classification and placement during the implementation of the school merger process. There were no records of meetings by the SMTs and task teams found in any of the schools and neither were there any records of shared meetings between the SMTs and task teams in any of the schools. This supported the views expressed on by the principals from the schools E and F that the SMTs and task teams had not held any joint meetings to discuss the school merger challenges in schools. This may be an indication that the SMTs and task teams did not work together and that they not supported each other when implementing the school mergers.

4.5. Conclusion

This chapter presented the analysis of the data which had been collected. The data from the interviews was analysed and the major themes which emerged were analysed and compared with predetermined themes. These are themes that, as the researcher, I developed to describe exactly what they included or excluded (Leedy and Ormrod 2010). The documents, including minutes of the meetings held by the SMTs and task teams and guidelines on the school merger process were perused, analysed and the findings reported.

Informed by their observations the HoDs who participated in the study voiced different understandings and interpretations of the concept of a school merger, The findings from the data collected from the interviews revealed the absorption of middle schools into primary and secondary schools and, thus, their disappearance. The school merger process that had resulted in the displacement of HoDs from one school to another had, at times, resulted in a change in their positions. It further revealed two motives behind the school mergers, namely, cost cutting and corruption on the part of the government. The disappearance of the former middle schools was, indeed, in line with documentation from the NWDoE on aligning middle schools with either primary and/or secondary schools, as stipulated in SASA act no. 84 of 1996. The documentation showed that the HoDs had had to be placed according to their profiles. However, this contradicted

the findings in relation to the displacement of the HoDs, thus implying that the DoE had not followed the guidelines.

It was clear that the HODs felt that the DoE had undermined them and had not prepared them for school mergers in the North West province. This led to hostile receptions, with educators, SMTs and learners rejecting the HoDs from the former middle schools. It emerged from the document analysis that the DoE documentation had not provided any direction on the role the HoDs should play in the school merger process. Those HODs who been upgraded into secondary schools had experienced difficult transitions without any assistance from the DoE. This, however, contradicted the findings from the document analysis that the HoDs should be placed according to their strengths and be given support. The refusal on the part of the department to extend the curriculum for some middle schools contradicted the document analysis, which found that middle schools should be encouraged to upgrade their curriculum.

The HODs' feelings and effects were evident in their accounts of the way in which the school mergers had impacted on their roles with the displaced HODs expressing feelings of despondency. The fact that the DoE had left the school merger process to school principals and had not managed the process has exacerbated the HODs' feelings of job insecurity. This finding was in contradiction to the guideline suggested by the NWDoE to the effect that the HoDs were to be counselled, profiled and correctly placed by the circuit and district officials

The HoDs cited various challenges with which they had been faced when performing their roles after their displacement. The findings from the data collected from the interviews showed that generally teaching and administration had been challenged, mainly because of the HODs' gap/lack of subject content knowledge as a result of having to teach subjects in which they had not specialised and/or having to teach and administer a higher level or grade. This led to further challenges in respect of their having to manage notional time and syllabus coverage and the lower grades being neglected. However, the major findings indicated a change in workload, role and responsibilities. However, none of this should have happened because the documentation showed that the HoDs should have placed according to their profiles and given support.

The findings from the data collected from the interviews also indicated that the HODs had been given a hostile reception. This suggested that no support was forthcoming from either the new

schools or the circuit and district officials. This further indicated a lack of preparation on the part of the DoE. The expected preparations and support should have included the professional development of the HODs both pre and post the school mergers. The study revealed challenges in relation to classroom teaching and curriculum, planning professional development, making departmental decisions, supervising teaching, mentoring and guiding teachers.

Some of the participants cited experiencing the school mergers as an unpleasant and difficult transition the former middle schools, with three (Grades 7–9) to five grades in either primary or secondary schools. This resulted in the displaced HoDs encountering drastic changes to the scope of work as they moved from middle to secondary schools. In relation to the increase in workload, the HoDs had been accustomed to teaching, administering, moderating and observing the work of teachers for three grades and but, after the school mergers, they were responsible for five grades. Many of them were clearly still confused about teaching, administering, moderating and observing the work of teachers in subjects and/or learning areas for which they were not qualified. According to the NWDoE's guidelines on the school rationalisation process, the DoE was required to schedule the counselling, mentoring and developing of educators after the school merger.

The chapter presented the study findings on how the HoDs in the North West province had experienced school mergers, displaced HoDs' understanding of successful strategies in respect of performing their roles and responsibilities, the challenges they had experienced and how they had approached these challenges after the school mergers. The next chapter presents the conclusions to the study and recommendations based on the study findings.

CHAPTER 5

CONCLUSION AND RECOMMENDATIONS

5.1 Introduction

In the previous chapter the research findings from the interviews which were conducted with the HoDs were presented. This chapter presents a brief analysis of the understandings derived from the literature review in relation to the research questions. The findings from the empirical research conducted in order to find answers to the research questions on the nature of and reasons for the way in which the participating HoDs had experienced school mergers in the North West are also be presented in this chapter. Finally, certain recommendations for further research on the topic are made. The aim of this chapter is to highlight the main findings of the study which were reported in Chapter 4 and to present these findings in line with the interview questions which were aligned to the secondary research questions which supported the primary research question, namely, “How did the HoDs in the North West experience school mergers?” The main findings that arose from responses were:

- Definitions of and reasons for school mergers, which included doing away with middle schools to create a school system comprising primary and secondary schools only by combining schools in the interests of cost cutting.
- Expected role played by the HoD participants encompassed the preparations for, as well as the documentation relating to, the transition to and the extension of the curriculum/upgrading of middle schools.
- The school mergers had an impact on the role of the HoDs as a result of their displacement and the resultant uncertainty, job insecurity, low morale, anxiety, disillusionment and frustrations.
- The challenges experienced by the HoDs in performing their roles after their displacement included increased workload (from three to five grades); drastic change in roles and responsibilities; demotivated educators; and lack of curriculum knowledge (supervising and teaching subjects for which they were not qualified).

- The HODs did not receive any support to help them to cope with the displacement and neither did they receive assistance with motivation, counselling and professional development. In addition, they were not placed at the correct levels according to their qualifications and ability.

5.2 Discussion

The main purpose of this research study was to investigate the experiences of displaced former middle school HoDs after the school mergers that took place in the North West province. Chapter 4 presented the detailed views of HoDs on the research topic. In this chapter their arguments are compared to the research findings noted in existing literature on the research topic. Recommendations based on the HoDs' experiences and the literature review are also presented below.

5.2.1 School merger as defined by the HoDs

The HoDs who participated in this study expressed various understandings and interpretations of the concept of a school merger. Informed by their observations rather than the information communicated to them by the NWDoE, the HoDs in this study viewed a school merger as denoting the following three things. One, *absorption of middle schools into primary and secondary schools*, and their subsequent disappearance, two, *displacement (HoDs) from one school to another* and, three, *change in their positions*, i.e. from an HoD post to an educator post. According to the participants, there were two or more reasons for the above with the first possible reason being *cost cutting* and the second one being *corruption* on the part of the provincial government – as discussed below.

5.2.1.1 Absorption of middle schools into primary and secondary schools

The data collected revealed that the respondents defined the school mergers as the disappearance of former middle schools which were absorbed into primary or secondary schools. “*They want to create a particular system whereby they “kill”; they destroy, middle schools completely and leave two systems, namely, primary from Grade R to Grade 7 and secondary from Grade 8 to Grade 12 (HoD₂)*”. This step was, however, in line with SASA 84 of 1996. “*School mergers involve creating secondary and primary schools by dissolving middle schools (HoD₇)*”. HoD₄ commented, “*The DoE actually wanted to get rid of the middle schools, they just wanted to have primary and*

secondary schools”. It was therefore imperative that the DoE in North West implement the reclassification of schools according to sections 5(2) and 5(4) of SASA 84 of 1996, thereby maintaining eight years of primary schooling (Grades R–7) and five years of secondary schooling (Grades 8–12). However, this was possible only through school mergers and the closure of the former middle schools (DoE, August 2014:3). The literature review conducted for the purposes of this study revealed an impartial interpretation of the definition of the term *school merger* as the disappearance of former middle schools. According to various researchers, including Botha (2001), a school merger comprises the amalgamation of two or more schools with the identity of the larger school being retained. Botha (2001) defined a school merger as an inter-institutional organisational solution and as a “process which is irreversible and leading to totality the legal death of middle schools or both middle schools and secondary schools in the creation of a new secondary schools’.

It was clear that the participants in the study defined school merger relative to their own situations and that they felt targeted because middle schools were an educational phenomenon found in the former Bophuthatswana. “*Schools in the former Bophuthatswana seem to be the ones which still had three phases, namely, primary, middle and high schools, they are targeting us (HoD₅)*”. In fact, the DoE North West was targeting middle schools in order to realign the schooling system inherited from the former Bophuthatswana (DoE, August 2014:4). This assertion is in agreement with the literature reviewed, as Pinheiro et al. (2016) and Botha (2001) claim that a forced merger is one which is initiated by the DoE in question as a top-down process in order to correct certain imbalances of the past.

5.2.1.2 Displacement of HoDs from one school to another

During the empirical investigation it was discovered that the majority of the participants had defined the concept of a school merger on the basis of their displacement from former middle schools to either primary or secondary schools. For many of the participants, the implementation of the school merger process to realise the realignment of the schooling system into primary and secondary in the North West was a prerequisite for dissolving existing middle schools in the province. However, they were of the opinion that the placement of HoDs should have preceded the implementation of the school mergers. According to HoD₂, “*As your school merges with my school we are creating movement. The middle school is the one that is dying so it means the department should place HoDs according to their qualifications but that was not done*”. In line

with this opinion HoD₁ said, *“I am a qualified secondary school teacher and I deserve to be placed in a secondary school but I’m now an HoD in a primary school”*. The displacement of HoDs due to the school mergers contradicted Weber et al. (2013), who maintain that a school merger should be a reflection of the attributes of both schools to the extent that the management of the merging schools controls the school merged. The reason for this is that schools differ according to the district and even circuit office in relation to the curriculum offered (De Haan et al., 2016). To promote the fair decision-making procedures, the HoDs should have been given the opportunity to be heard, there should have been an absence of bias (Lipponen et al., 2004)

5.2.1.3 HoDs changing positions

Skodvin (1999) cautions that school mergers constitute radical, drastic, and dramatic change. However, having to change roles from that of HoD to educator is also extreme. This assertion was supported by the findings of the literature review. It was clear from the participants’ definitions of the term *school merger* that some of the HoDs from the former middle school had to change their positions. *“I was a middle school principal there, and now I’m HoD here. It is a painful change (HoD₂)”*. This quote was in line with the fact that a school merger is neither an easy nor a smooth process (Skodvin, 2014).

Cost cutting and corruption on the part of the provincial government

Inadequate communication from the DoE North West had led to misinformation about the intentions behind disbanding the middle schools in the North West province. In giving their perceived reasons for the school mergers some of the HoD participants had alluded to corruption on the part of the DoE North West. *“So, to me, it’s just maybe the government is the one that is... they are the ones who got something out of this but, for us, we didn’t benefit (HoD₁)”*. However, all the participants did agree that the department had been cutting costs with HoD₅ stating, *“Probably the government does not want to pay many principals so they are grouping the schools so as to save money to avoid paying many principals”*. The reasons for the school mergers as advanced by the participants were consistent with the view of Duncombe and Yinger (2007) with the school merger being generally viewed as a way for the DoE to cut costs. School mergers are economically efficient and effective (Skodvin, 1999, Lethoko, 2016). The school mergers brought together resources, including human and physical resources, thus assisting the DoE North West to cut costs In sharing the same sentiments Naidoo and Baloyi (2016) maintain that the school

mergers may be viewed simply as a quantitative reduction of the apartheid planned schooling system of the past.

5.2.2 Involvement of the HoDs in the school merger process

It was clear from the opinions expressed by the participants in this study that they felt it was normal for the HoDs all to have experienced hostile feeling towards the preparations which had not taken into account their roles and expectations. It was evident that their hostile feelings arose from their unpleasant their horrible experience of the school merger process. The role played by HoDs in this study referred to the following four factors, namely, firstly, the short-lived, “smash and grab” type of preparations, secondly, the undocumented role played by the HoDs, thirdly, the appalling transition during the upgrading to secondary schools and, fourthly, the refusal to upgrade to secondary schools. These factors are all discussed below.

5.2.2.1 Short-lived, “smash and grab” type of preparations

The insufficient preparations had impacted adversely on the implementation of the school merger process, particularly in relation to the correct placement of the HoDs from the former middle school in either primary or secondary schools. *“The subdistrict officials and circuit managers came here for several meetings to prepare us. They are the ones who facilitated the meetings with the stakeholders but without our involvement (HoD₃)”*. The majority of the HoD participants expressed the view that their lack of involvement in the preparations had led to their being misplaced. This was, however, in contrast with the literature review but not the document analysis as, according to SASCO (2009), it was of the utmost importance that the DoE to measure the ‘strategic fit’ of the HoDs from former middle schools during the preparations for the school mergers. This aligns with the view that the role, behaviour and ability of school management and at the circuit and district levels included identifying and classifying all HoDs from the former middle schools to ensure their ‘fit’ in the primary and secondary schools to which they were deployed (De Haan et al., 2016; Liu et al., 2010).

5.2.2.2 Undocumented role played by HoDs

As they voiced their common anger towards the fact that they had not been prepared for the school mergers, most of the participants also pointed out that their roles and expectation had not been documented. According to HoD₇, *“They gave us the pamphlets to go through which said nothing*

about our expectations as HoDs”. The finding that the HoD participants were of the opinion that their roles and expectations should have been documented was in agreement with the literature review. In order to understand the HODs’ opposition to the school mergers, it was necessary first to understand how the change would affect each individual and to document those effects in order to understand them (Jacobsen, 2012)

5.2.2.3 Appalling transition when upgrading to secondary schools

The former middle schools that upgraded their curriculum to become secondary schools after school merger were not affected by the duplication of posts and there were no surplus of HoDs. However, they all voiced the common problem of not having been guided through the transition involved when the former middle schools were absorbed into the secondary schools. *“We were not guided or received into the secondary schools and our mergers were not based on human resources such as ‘Who do we have to teach such a subject?’ as they just agreed on a commercial secondary school with no support from our department (HoD₇)”*. The literature supports the need to mentor, arrange professional development for and guide HoDs who are affected by the school merger process. If this is not done then administration, teaching and learning all suffer in the school merger (Pinheiro et al., 2016). Furthermore, the literature highlighted the need for a DoE to prioritise support prioritization to ensure the smooth implementation of the curriculum change resulting from school mergers.

5.2.2.4 Refusal to upgrade to secondary schools

Other former middle schools had applied for curriculum extension and the NWDoE had refused. At the time of the study, displaced HoDs were still unable understand the reasons for the refusal to allow them to upgrade to secondary schools. The former middle schools had been given the option of a merger involving the closing of the middle schools or a merger involving either a downgrading to a primary school or an upgrade to a secondary school (DoE, 2012–2016:15). HoD₂ indicated, *“We were not given the chance to extend the curriculum. They literally refused to give us the chance because we did apply. No reasons were given even today although I asked personally*. Existing literature aligned strongly with the views of the participants that the implementation of forced school mergers may damage the “new school” environment in relation to the numerous basic roles and responsibilities of HoDs (Botha, 2001).

5.2.3 Impact of school mergers on HoDs' roles

The data collected provided evidence of the participants' different feelings and also the various ways in which the school merger had affected the HoD participants, primarily because of the way in which the school mergers had impacted on their roles. Informed by their encounters, the HoDs mentioned the following four effects of the school mergers: Firstly, despondency among the displaced HoDs, secondly, the responsibility of school merger being left to the principals of merging schools by the NWDoE, thirdly, counselling for the displaced HoDs and, fourthly, the assumption that HoDs from middle schools could become HoDs in either primary or secondary schools. According to them, the above mentioned were driven by competing for posts/redeployment and qualifications.

5.2.3.1 Despondency among the displaced HoDs

The despondency and hopelessness experienced by the displaced HoD participants may be said to have been caused by their lack of the skills required in their new establishments. HoD₃ commented, *"I'm a secondary qualified teacher but I'm here in a primary school and the other HoD went to a nearby primary school. But being in a primary school is a... challenge because I haven't done child psychology"*. The findings were contrary to the working document on school mergers in terms of which the skill requirements of the new establishment should match the skills profiles and experience of the HoDs from the former middle schools (DoE, 1.3 Aug 2014: 4). The study findings further disagreed with the literature review which clearly indicated that the defined roles, behaviour and abilities of HoDs be identified and classified according to the posts available in the merging schools (De Haan et al., 2016; Liu et al., 2010)

5.2.3.2 Principal responsible for the school merger

The findings strongly suggested that DoE had left the school merger process to school principals and that the DoE had not managed the process. HoD₉ said: *"The government left the process to the principals to manage. A very hurtful process for the principals and officials from NWDoE did not monitor and support the school merger"*. The study further revealed that the principals from both the primary the high schools had preferred their own HoDs to those who had come from the former middle schools. HoD₁ commented, *"Even though better qualified than the HoDs in the high schools some of us had to go to different schools. I'm here in a primary school because of the*

limited posts. The principals preferred their HoDs". HoD₂ said, "There was a time when I went for almost eight months without working, not having allocated duties. Eight months getting paid for nothing because the principal did not want to allocate work to me". This finding strongly contradicts the literature review as, according to Goedegebuure (2012), school mergers are based on a sound, strategic rationale as well as being systematically planned and well executed by the DoE in question. However, despite the fact that school merger procedures are initiated by government they are often linked to considerable conflict and tensions among the merging schools, teaching and administrative staff as the school mergers are left to the school managers (Skodvin, 2014).

5.2.3.3 Counselling of displaced HoDs

Feelings of uncertainty, job insecurity, low morale, anxiety, disillusionment, and frustrations were evident among the displaced HoDs who voiced a strong need for displaced HoDs to receive counselling. HoD₅ said, "Reduce the emotions HoDs are feeling after school mergers. HoDs are resigning due to the merger". The impact of the mergers on staff members was devastating for the emotional and professional lives of all the HoDs at all levels (Jansen, 2003, Arnolds et al., 2013). Goedegebuure (2012) and Pinheiro et al. (2016) are of the opinion the challenges HoDs experience during school mergers include fear, stress and tension which then lead to resistance on their part.

5.2.3.4 Assumption that HoDs from middle schools could be HoDs in either primary or secondary schools.

The impact of the school mergers on the displaced HoDs role was evident in the findings which revealed that they had not been given the opportunity to choose for themselves whether they would be allocated as HOD to either a primary or a secondary school according to their skills and capability. HoD₂ commented as follows: "You are assuming that I must take them from Grade 8 to Grade 12. I was never even consulted. I was not appointed; my role was assumed". This finding was in contrast to the literature review which suggested that school mergers improve the quality of education, particular in relation to better placed HoDs (Liu et al., 2010). The assumption that HoDs from the former middle schools would be capable of heading departments in secondary schools without consulting them was limiting their skills and capabilities. This further defeated the purpose of school mergers which were not resulting in a culture of teaching and learning which

would lead to improvement in and maintenance of high standards of education is not restored (SASA, 1996: s 12A).

Competing for post/redeployment and qualifications

It was clearly felt that hostility which had arisen was the result of competition for posts between the HoDs from the former middle schools and those from the recipient schools. There was also evidence of a duplication of posts with *HoD₃* having the following to say: *“They did not know what to do with us because we came with our principal and deputy and they had their own. There were HoDs there, we came, and you know the issue of PPM”*. Feelings of uncertainty, low morale and frustrations were rife among the participants. *HoD₁* stated, *“They will never ask you as to how you are coping. The next thing the PPM demands one of you must go. You see, so you become frustrated at times”*. This finding was in line with the literature review which indicated that school mergers usually involve extensive lay-offs or else HoD jobs become redundant (Van Vuuren et al., 2010). The main focus of school mergers is on financial and strategic alliances (Pinheiro et al., 2016) and certainly not on the HODs involved (Goedegebuure 2016). According to Jacobsen, 2012, not involving HoDs leads to professional disagreement, fear of the unknown, and a loss of identity on the part of the displaced HoDs.

5.2.4 Challenges faced by displaced HoDs in performing their roles

The HoDs who participated in this study related different narratives on the way in which the school mergers had impacted on their work. On the basis of their experiences in relation to school the HoDs cited the following five factors, namely, *leading and teaching subjects for which they were not qualified, content gap, notional time and coverage of syllabi (GET and FET), lower grades being neglected and changed workloads, roles and responsibilities*. As discussed below these factors had resulted from a lack of profiling and training of the HoDs on the part of the provincial government.

5.2.4.1 Leading and teaching subjects for which they were not qualified

The findings revealed that, in addition to their increased workloads, the displaced HoDs were having to teach and administer subjects with which they were not familiar and for which they were not qualified. *According to HoD₃, “I had specialised in the subjects that I was teaching. I was brought to a primary school and I was told that, aa... I must teach something that I did not know”*.

In addition, some of the HoDs who had been displaced were teaching subjects in relation to which they had little or no subject knowledge. HoD₇ remarked, *“There is a huge gap between the FET phase and the GET phase which makes it difficult to the HoDs deployed to secondary schools if they were from middle schools”*. This led to resistance on the part of educators who report under the displaced HoDs. Further there is discomfort and discouragement on the part of the majority of the HoDs, HoD₉ stated, *“Teachers don’t cooperate and, even now, I am not acclimatising. I am teaching and administering mathematical literacy and agricultural sciences. I have never done these two subjects”*. This finding is in line with the working document on merger of schools according to which the skills requirements of the new establishment may not match the skills profiles of the HoD in question. Therefore, in terms of section 6 and section 8 of the EEA, 1998, as amended, the head of the department may transfer an HoD to another post that matches his/her skills and experience (DoE, 1.3 Aug 2014: 4). The literature further supports the views on mentoring, organising professional development for and guiding HoDs who are affected by school mergers. Thus, the DoE should prioritise support for the HODs affected by school mergers to ensure the smooth implementation of curriculum change through school mergers (Pinheiro et al., 2016)

5.2.4.2 Content gap

The study findings indicated considerable resentment on the part of the HoDs in relation to subject content gaps which resulted in a lack of curriculum knowledge. HoD₃ commented, *“The main challenge is content gap. Content gap meaning that I am not confident about what I teach, that creates a problem and teachers are losing confidence in me”*. This finding contradicted the literature review which had mentioned that Bush and Glover (2002:10) perceive an HoD as an instructional leader who is responsible for ensuring that HoD ensure that teaching and learning take place between educators and learners. However, it difficult for HoDs to manage and teach if there is content gap.

5.2.4.3 Notional time and coverage of syllabi (GET and FET)

In terms of notional time and syllabi coverage the findings indicated that the displaced HoDs had been used to a certain instructional time for Grades 7 to 9 in the former middle schools. Thus, adjusting to the allocated 27.5 hours per week as the minimum requirement for Grades 10 to 12 was posing a challenge which was affected their work, especially in relation to syllabi coverage.

HoD₁ opined, *“Difference was the time... time limit was not the same. You understand in GET it is 30 to 35 minutes and, in FET, it was upwards of 50 minutes to an hour”*. The findings further revealed that the ATPs and programmes of assessment for both GET and FET were not aligned. HoD₇ stated, *“The department is failing us in a way because the programme of assessment and ATP are not the same. The time allocated is not the same”*. However, this finding was contrary to the literature review on school mergers which cited curriculum as the core business that takes centre stage in order to address the delivery of learning opportunities for all learners (Makgoba & Mubangizi, 2010:1)

5.2.4.4 Neglect of lower grades

The study revealed that more attention was being given to the Grade 12 syllabus and FET (Grades 10–12) while the GET (Grades 8 and 9) was being neglected, which had a negative impact on the work in GET. HoD₈ commented, *“In FET (laughing) Grade 12 is the main focus whatever because, when they are done, school is over. We stop and wonder what is going to happen to the lower classes because the ATP does not allow us to invigilate”*. This finding was not in line with the perception of school mergers as a sound measure for solving the many problems and challenges of school merger, including aligning ATPs and assessment programmes across the grades (Pinheiro et al., 2016; Skodvin, 2014)

5.2.4.5 Changed workloads, roles and responsibilities

The findings indicated that the HoDs’ workloads were appalling while their roles and responsibilities had changed drastically with this affecting the HoDs on a daily basis. In the middle schools the HoDs had been responsible for administering, moderating and observing the work of the teachers for three grades only and for teaching just three grades. However, this had now increased to five grades, namely, Grade 8 to Grade 12. HoD₄ remarked, *“From three to five grades is very hectic”*. This increased workload meant that the displaced HoDs were unable to mentor, moderate, check learner/teacher books, assess and teach. HoD₃ said, *“Despite the huge workload, I am not confident about what I teach and that creates a problem and the teachers are losing confidence in my leadership in the subjects I am not qualified for”*.

Existing literature supports the view that school mergers are both radical and drastic and that they entail dramatic changes that affect not only management but the ‘souls’ of the HoDs involved (Skodvin, 1999). Thus, instructional leadership in respect of school mergers would define the roles

and responsibilities of the HoDs (Jacobsen, 2012) and provide support for the displaced HoDs by developing them by means of mentoring, guiding and supervising; administration and management of curriculum, subjects and phases as well as monitoring teachers' work (De Haan et al., 2016; Liu et al., 2010). The change in workload, roles, and responsibilities was not in line with the conditions of employment of HoDs, the Education Laws Amendment Act (2007) and Employment of Educators Act (1998) which state that HoDs are required to teach, guide and supervise the work and performance of educators in at least two subjects for which the HoDs are qualified, namely, REQV 13+.

The aim of school mergers is the restoration of a culture of teaching and learning to ensure an improvement in and the maintenance of a high standard of education (SASA, 1996: 12A). However, the findings of this study were in contrast with the workload of school-based educators in terms of which the scheduled teaching time of HoDs is 85%. In addition, management in education should be able to draw on the professional competencies of educators and, thus, the authorities need to allocate authority and responsibility in such a way that it will ensure the building of human resource capacity (ELRC Resolution No. 7 of 1998).

Lack of profiling and training of HoDs

The findings were in agreement with the literature review. For example, Lethoko (2016) speculates that, as employees, HoDs often find themselves in annoying and undefined situations during the school merger process. This often influenced many displaced HoDs who lack the required skills and knowledge to enable them to be effective in their responsibilities in the new schools. However, the findings were in contradiction with the view that the aim of the implementation of the school merger process is to ensure the capacitating of the HoDs with the attitudes, knowledge and skills required to improve their performance (DoE, 2012–2016:12) and also with the views of the proponents of school mergers who maintain that they enhance educational quality, for example in relation to educational resources, especially in terms of better teachers and facilities (Liu et al., 2010).

5.2.5 The support given to displaced HoDs to enable them to cope

In relation to the participants in this study, it is normal for displaced HoDs to express common hostile feelings in respect of the support they receive during school mergers to enable them to cope. It was evident that the hostile feelings of the participants were the result of their unpleasant experiences during school mergers. The following three findings emerged from the study, namely, *unwelcoming behaviour on the part of the schools to which the HoDs were deployed, appalling transitions when upgrading to secondary schools and the lack of professional development* offered to them by the provincial government. These findings are discussed below.

5.2.5.1 Unwelcoming behaviour

According to the study findings, the unwelcoming behaviour on the part the new schools had created animosity between the participants and the receiving schools. HoD₁ remarked, “*Four years, aa... no change, hey (laughing), no change, 4 years of no change. I feel my role and responsibility as an HoD is not valued*”. It appeared that the hostility between the educators was due to competition for existing posts. HoD₃ commented, “*The teachers there were a bit edgy, they were threatened because we were joining them due to PPM*”. This hostility was exacerbated by the feelings of job insecurity arising from the ongoing redeployment of teachers in terms of the ELRC Resolution 2 of 2003. School mergers involve new relationships, different cultures and social life changes (Terry & McKimmie, 2016), especially in instances where HoDs are redeployed from former middle schools to secondary schools. The finding in relation to the competition for existing posts is in line with the findings of Goedegebuure (2012) and Pinheiro et al. (2016) that the challenges which HoDs experience during school mergers include fear, stress and tension which lead to resistance.

5.2.5.2 Unpleasant transitions when upgrading to secondary schools.

The finding revealed that the HoDs who were upgraded to secondary schools were not given the necessary support and welcome with no preparations being made for the transitions and no one from the DoE supporting them through these transitions, irrespective of their qualifications and/or how displaced HoDs cope (Amiot et al., 2012). The HoDs from the former middle schools who were deployed to secondary schools did not receive motivation, counselling and/or professional development and, finally, they were not placed at the correct levels according to their qualifications and abilities. The HoDs from these former middle schools had more than fifteen years of experience

and relocating them had involved moving them from their comfort zones (Duncombe & Yinger, 2007).

5.2.5.3 Lack of professional development

The findings revealed that, in particular, the HoDs had received no support from subject specialists, circuit, subdistrict and district officials to help them to cope with the transition and, also, that they had not been offered any professional development to assist them to lead and teach different subjects at different levels. HoD₂ stated that, *“The department pushed this merger but they did not train the educators. There were no training workshops to prepare HoDs when they met the educators in the new schools.* There is a need for information about the way in the school mergers affect the displaced HoDs (Jacobsen, 2012) in terms of professional disagreements as well as the additional work and new responsibilities (Goedegebuure, 2012, Pinheiro et al., 2016). In addition, professional development by subject specialists as well as by circuit, subdistrict and district officials is imperative (Goedegebuure, 2012).

5.3 Recommendations and conclusions

5.3.1 Recommendation 1: Resources

When a former middle school, which offers three grades (7–9), is merged with a high school, which offers three grades (10–12), this involves infrastructure that was designed to accommodate three grades (10–12) having to accommodate five grades (8–12), with the concomitant impact on the available resources. Furthermore, when two schools merge into a secondary school there is often a duplication of positions as the merger often involves the principal, deputy principal, HoDs and teachers from the former middle school being deployed to the receiving school and, hence, has a negative impact on the PPM. It is, therefore, recommended, that before schools are merged, the resources of the receiving school are taken into account because resources are often the main problem.

5.3.2 Recommendation 2: Preparation, welcoming/receiving and support

In view of the fact that HoDs are expected to administer teaching and learning, it is recommended that the HoDs involved in a school merger be prepared in the subjects they will be expected to supervise by offering them counselling and professional development. This should include the generic leadership aspects of their jobs to elevate such skills to the expected standards of their

roles and responsibilities in the receiving school. In addition, in relation to the welcoming/receiving aspect ongoing support from circuit officials, subject specialists and the DoE is recommended for a period of three years in the form of retraining and workshopping the HoDs.

5.3.3 Recommendation 3: Placement

Based on the previous recommendation it is vital that the issue of the HoDs' displacement is addressed with the HoDs being placed according to their qualifications as well as their ability to teach and administer two or more subjects depending on the size at either the secondary level or the primary level.

5.3.4 Recommendation 4: Workload, roles and responsibilities

Given the workload, roles and responsibilities of the HoDs in addition to their teaching and administering the curriculum, it is recommended that, during school mergers, the job descriptions of the HoD are made simpler and clearer and that the HoDs are allocated sufficient time to balance their leadership duties and teaching effectively.

5.3.5 Recommendation 5: New school

In order to reduce the emotions HoDs experience as a result of school mergers and the rate of resignations triggered by such school mergers, it is recommended that, at the very least, the two principals from the middle and receiving schools are redeployed elsewhere and that a new principal be appointed for the merged school. This would help to create a new working environment.

5.4 Recommendations for further research

It is possible that, in this research study, the experience of the displaced HoDs in relation to the school mergers may have been influenced by their qualifications, the attitudes in the schools to which they were deployed (SMT), change of environment and their comfort zones in their previous areas of operation. It is, therefore, recommended that further research be conducted into the way in which these factors impact on the displaced HoDs who are deployed to new schools after school mergers. With the evident resistance on the part of the displaced HoDs arising from the above mentioned factors further research would, hopefully, find a way in which to address the perceptions of the displaced HoDs towards the school mergers and, thus, reduce their evident resistance.

REFERENCES

- Adams, W. 2015. *Conducting semi-structured interviews*. doi:10.1002/9781119171386.ch19
- Adom, D., Hussein, E. & Agyem, J.A. 2018. Theoretical and conceptual framework: Mandatory ingredients of a quality research. *International Journal of Scientific Research*, 7: 438–441.
- Ahmadvand, A., Heidari, K., Hosseini, H. & Majdzadeh, R. (2012). Challenges and success factors in university mergers and academic integrations. *Archives of Iranian Medicine*, 15: 736–740.
- Amiot, C.E., Terry D.J. & McKimmie, B.M. 2012. Social identity change during an intergroup merger: The role of status, similarity, and identity threat. *Basic and Applied Social Psychology*, 34(5): 443–455. doi:10.1080/01973533.2012.712016
- Arnolds, C.A., Stofile, R.N. & Lillah, R. 2013. Assessing the outcomes of the higher education mergers in South Africa: Implications for strategic management. *Acta Commercii*, 13(1). <http://dx.doi.org/10.4102/ac.v13i1.175>
- Ary, D., Cheser, L. & Jacobs, C. K. 2010. *Introduction to research in education*, 8th edition. Wadsworth.
- Bernard, H.R. 2002. *Research methods in anthropology: Qualitative and quantitative approaches*, 3rd edition. Walnut Creek, CA: Alta Mira Press.
- Boen, F., Vanbeselaere, N. & Cool, M. 2006. Group status as a determinant of organizational identification after a takeover: A social identity perspective. *Group Processes & Intergroup Relations*, 9(4): 547–560.
- Botha, M. 2001. Models for mergers in higher education. *South African Journal of Education*, 21(4): 273–280.
- Bowen, G. 2009. Document analysis as a qualitative research method. *Qualitative Research Journal*, 9: 27–40. doi:10.3316/QRJ0902027.
- Brasington, D.M. 1997. School district consolidation, student performance and housing values. *Journal of Regional Analysis and Policy*, 27(2): 43–54.

Bush, T. & Glover, D. 2002. *School leadership: Concepts and evidence*. Nottingham: National College for School Leadership.

[Cartwright, S.](#) & [Cooper, C.L.](#) 1993, Of mergers, marriage and divorce: The issues of staff retention". *Journal of Managerial Psychology*, 8(6): 7–10.

Chambers, D.R. & Lacey, N.J. 1994. *Modern corporate finance: Theory and practice*. New York: HarperCollins.

Cohen, L., Manion, L. & Morrison, K. 2011. *Research methods in education*: Routledge Falmer.

Corbin, J. & Strauss, A. 2008. *Basics of qualitative research: Techniques and procedures for developing grounded theory*, 3rd edition. Sage Publications.

Creswell, J.W. 2012. *Educational research: Planning; conducting; and evaluating quantitative and qualitative research*, 4th edition. Boston, MA: Pearson.

Creswell, J.W. 2009. *Research design: Qualitative, quantitative, and mixed methods approaches*, 3rd edition. Los Angeles: Sage Publications.

Creswell, J.W. & Miller, D. 2000. Determining validity in qualitative enquiry. *Theory into Practice*, 39(3): 124–130.

David, M. & Sutton, C.D. 2004. *Social research: The basics*. London: Sage Publications.

Day, C. & Kington, A. 2008. Identity, well-being and effectiveness: The emotional contexts of teaching. *Pedagogy, Culture & Society*, 16(1): 7–23.

De Haan, M., Leuven, E. & Oosterbeek, H. 2016. School consolidation and student achievement. *The Journal of Law, Economics, and Organization*, 32(4): 816–839.

Denzin, N. & Lincoln, Y. 2003. *Strategies of qualitative inquiry*. Thousand Oaks CA: Sage Publications.

Department of Education (DoE). 2009. *Guideline for the rationalization of small or non-viable schools*. July.

Department of Education, the Ministerial Committee on Rural Education published a report entitled A New Vision for Rural Schooling 2005.

Department of Education. 2014. *Regulations relating to minimum uniform norms and school infrastructure*.

Duncombe, W. & Yinger, J. 2007. Does school district consolidation cut costs? *The MIT Press*, 2(4): 341–375

Education Labour Relations Council Resolution no. 7 of 1998.

Fleming, P. & Amesbury, M. 2012. *The art of middle management: A guide to effective subject, year and team leadership*. New York: Routledge.

Goedegebuure, L. 2012. *Mergers and More: The changing tertiary education landscape in the 21st century*. HEIK Working Papers Series.

Golafshani, N. 2003. Understanding reliability and validity in qualitative research. *The Qualitative Report*, 8(4): 597–606. Available at: <http://nsuworks.nova.edu/tqr/vol8/iss4/6>

Guba, E.G. (ed.). 1990. *The paradigm dialog*. Sage Publications.

Guest, G., Bunce, A. & Johnson, L. 2006. How many interviews are enough?: An experiment with data saturation and variability. *Field Methods*, 18(1): 59–82. <https://doi.org/10.1177/1525822X05279903>

Harman, G. & Harman, K. 2003, Institutional mergers in higher education: Lessons from international experience. *Tertiary Education and Management*, 9: 29–44. <https://doi.org/10.1023/A:1022261409801>

Hay, D. & Fourie, M. 2002. Preparing the way for mergers in South African higher and further education institutions: An investigation into staff perceptions. *Higher Education*, 44(1): 115–131.

Henning, E., Van Rensburg, W. & Smit, B. 2004. *Finding your way in qualitative research*. Pretoria: Van Schaik.

Jacobsen, D.I. 2012. *Organisasjonsendringer og endringsledelse*. 2nd edition. Bergen: Fagbokforlaget.

Jansen, J. 2003. Merger in South African higher education: Theorizing change in transitional contexts. *Politiko*, 30(1): 27–50.

Johnson, B. & Christensen, L. 2008. *Educational research: Quantitative, qualitative, and mixed approaches*, 3rd edition. Thousand Oaks, CA: Sage Publications.

Johnson, S., Cooper, C., Cartwright, S., Donald, I., Taylor, P. & Millet, C. 2005. The experience of work-related stress across occupations. *Journal of Managerial Psychology*, 20(2): 178–187.

Karodia, A., Shaikh, A. & Soni, D. 2015. The South African universities post-merger mess: Problems and challenges of transformation. *Mediterranean Journal of Social Sciences*, 6. doi:10.5901/mjss.2015.v6n3s1p326

Kerr, C. 1991. *The great transformation in higher education: 1960–1980*. New York: State University of New York Press.

[Lee, D.H.L.](#) & [Chiu, C.S.](#) 2017, “School banding”: Principals’ perspectives of teacher professional development in the school-based management context". *Journal of Educational Administration*, 55(6): 686–701.

Lee, J.C.-K. & Yin, H.-B. 2011. Teachers’ emotions and professional identity in curriculum reform: A Chinese perspective. *Journal of Educational Change*, 12: 25–46. doi:10.1007/s10833-010-9149-3

Leedy, P.D. & Ormrod, J.E. 2010. *Practical research. Planning and design*, 9th edition. Cape Town: Pearson.

Lethoko, M. 2016. Taking stock thirteen years later: An investigation into the impact of mergers on institutions in the higher education landscape in South Africa. *Alternation*, 23(1): 15–39.

Linde, B. & Schalk, R. 2006. Experience of the employment relationship after a merger. *Management Revue*, 17(4): 484–498.

Lipponen, J., Olkkonen, M.E. & Moilanen, M. 2004. Perceived procedural justice and employee responses to an organizational merger. *European Journal of Work and Organizational Psychology*, 13(3): 391–413. doi:10.1080/13594320444000146

- Lui, C., Zhang, L., Luo, R., Rozelle, S. & Loyalka, P. 2010. The effect of primary school mergers on academic performance of students in rural China. *International Journal of Educational Development*, 30: 570–585.
- Mafuwane, B.M. 2011. The contribution of instructional leadership to learner performance. The University of Pretoria, South Africa
- Makgoba, M.W. & Mubangizi, J.C. 2010. *The creation of the University of KwaZulu-Natal: Reflections on a merger and transformation experience*. India: Excel Learning.
- Mason, J. 2002. *Qualitative researching*, 2nd edition. Sage Publications.
- Mathabe, N. 2004. Report of the Pro Vice Chancellor. Unpublished Unisa Annual Report. Pretoria: Unisa.
- Maxwell, J.A. 2005. *Qualitative research design: An interactive approach*, 2nd edition. Thousand Oaks, CA: Sage Publications.
- McMillan, J.H. & Schumacher, S. 2010. *Research in education: Evidence-based inquiry*, 7th edition. Cape Town: Pearson.
- Merriam, S.B. 2005. *Analysis of qualitative data*. San Francisco, CA: Jossey-Bass.
- Mordi, C., Adedoyin, H. & Ajonbadi, H. 2011. Impediments to women career advancement. The Nigerian experience. *Petroleum-Gas University of Ploiesti Bulletin*, LXIII(2): 11–22.
- Mfusi, M.X. 2004. The effects of higher education mergers on the resultant curricula of the combined institutions. *South African Journal of Higher Education*, 18(1). Unisa Press.
- Mkhonto, T.J. 2007. Challenges facing higher education curriculum reform, design, and management in the twenty first century. Completed thesis. University of Johannesburg.
- Mouton, J. 1996. *Understanding social research*. Pretoria: Van Schaik.
- Murchison, M.J. 2010. *Ethnography essentials: Designing, conducting and presenting your research*. USA: John Wiley & Sons.

- Myers, M.D. 2009. Qualitative research in information systems. *MIS Quarterly*, 21(2): 241–242.
- Naicker, S.R., & Mestry, R. 2013. Teachers’ reflections on distributive leadership in public primary schools in Soweto. *South African Journal of Education*, 33(2): 1–15.
- Naidoo, G. & Baloyi, M. 2016. Higher education mergers in South Africa: A means towards an end. *African Journal of Public Affairs*, 9(3): 19–29.
- Nguyen, H. & Kleiner, B. 2003. The effective management of mergers. *Leadership & Organization Development Journal*, 24: 447–454.
- North West Department of Education (NWDoe). 2014. *Draft Guidelines on School Rationalisation Process*.
- North West Department of Education (NWDoe). 2012–2016. *Revised Guidelines on the Rationalisation of Schools*.
- Patton, M.Q. 2002. Two decades of developments in qualitative inquiry: A personal, experiential perspective. *Qualitative Social Work*, 1(3): 261–283.
- Paulsen, S.E. 2009. Challenges faced by female managers in schools within the Nelson Mandela Metropole. Nelson Mandela Metropolitan University: Port Elizabeth.
- Pinheiro, R., Geschwind, L. & Aarrevaara, T. 2016. A world full of mergers: The Nordic countries in a global context. In I.R. Pinheiro, L. Geschwind & T. Aarrevaara (eds), *Mergers in higher education: The experience from northern Europe*. Switzerland: Springer International, 3–25.
- Price, L. 1999. Helping people to stay on their feet during mergers and acquisitions. *People Dynamics*, 17: 38–42.
- Robbins, D. 2009. *Understanding research methods: A guide for the public and non-profit manager*. Boca Raton, FL: Taylor & Francis Group.
- Sarker, S.I. & Khan, M.R. A. 2013. Classical and neoclassical approaches of management: An overview. *IOSR Journal of Business and Management*, 14(6): 1–5.
- South African Schools Act of 1996 (Act No. 84 of 1996)

SASCO. 2009. *Beyond the big bang mergers: A critical review of the higher education mergers in South Africa*. SASCO 16th National Congress discussion document: Education transformation. Available at: [http://www.sasco.org.za/docs/congress/16 congress/he mergers](http://www.sasco.org.za/docs/congress/16%20congress/he%20mergers)

Schultz, C. 2010. HR competencies at a merged higher education institution. *SA Journal of Human Resource Management*, 8(1). doi:10.4102/sajhrm.v8i1.225

Schoole, M.T.C. 2005. The politics of mergers in higher education in South Africa. *Higher Education Journal*, 50: 159–179. doi:10.1007/s10734-004-6357-x

Skodvin, O. J. 2014. Merger as an Instrument to achieve Quality in Higher Education: Rhetoric or reality? Paper presented in track 1 at the EAIR 36th Annual Forum in Essen, Germany.

Skodvin, O.J. 1999. Mergers in higher education – success or failure? *Tertiary Education and Management*, vol. 5: 65–80.

Tashakkori, A. & Teddlie, C. 2003. The past and future of mixed methods research: From data triangulation to mixed model designs. In A. Tashakkori & C. Teddlie (eds), *Handbook of mixed methods in social & behavioral research*. Thousand Oaks, CA: Sage Publications, 671–702.

Terry, D.J. & McKimmie, B.M. 2016. Social identity change during an intergroup merger: The role of status, similarity, and identity threat. *Basic and Applied Social Psychology*, 34(5): 443–455. doi:10.1080/01973533.2012.712016

The Constitution of the Republic of South Africa, 1996

Urio, J. 2012. The role of heads of departments in enhancing the quality of education in secondary schools in Tanzania. *Journal of Education, Humanities and Sciences*, 1(2): 39–50.

Van Vuuren, M., Beelen, P. & Menno, D.T. 2010. Speaking of dominance, status differences, and identification: Making sense of a merger. *Journal of Occupational and Organizational Psychology*, 83: 627–643.

Weber, Y., Tarba, S.Y. & Oberg, C. 2013. *A comprehensive guide to mergers and acquisitions: Managing the critical success factors across every stage of the M&A process*. USA & UK: Financial Times Press.

Yin, R.K. 2009. *Case study research: Design and methods*, 4th edition.. Thousand Oaks, CA: Sage Publications.

ANNEXURES

ANNEXURE A: LETTER TO THE SUPERINTENDENT GENERAL

3981 Monica Crescent
Unit 12
Mmabatho
2735

16 February 2018

The Superintendent General
Department of Education and
Sport development
Private Bag X2044
Mmabatho
Dear Sir/Madam

Request for permission to conduct research at one merged primary and secondary with former middle schools in Ngaka Modiri Molema district, sub – district Mahikeng

I am a Master's student at the University of Pretoria in the Faculty of Education. I wish to apply for permission to conduct the study titled: Heads of Departments' experiences of school merger in the North-West province at your school. The purpose of the study is to explore how the HoDs in the North-West province experience school mergers. The study intends to understand how school merger affected their psychosocial wellbeing and their roles and their roles and responsibilities as well as the challenges they experienced and how they approached such challenges. Once you understand what the study is about, you can decide if you want to grant such permission or not. If you agree, you will be requested to release a signed letter permitting the study to take place.

The process of field work is detailed below:

- The process will be in a form of semi-structured interviews as a way of collecting data. Where the HoD will be requested to spend some time sharing their understanding and experiences of school merger.
- I as the researcher will be accompanied by both my supervisor and co-supervisor as assistant researchers in the whole data collection process.
- If we are granted permission, we intend to be at the school for three sessions after school to avoid disruption of teaching and learning (the first two days will be for research activities, which will take 45 to 60 minutes and one day for member checking 30 minutes).

- To ensure the anonymity and confidentiality of the participants, we will keep HoDs' names, the name of the school and contribution to the study private except if it is the HoD's wish to be named.
- We do not think anything bad or risky will happen to HoD participating in this study. If problems do arise, they can speak to us and we will consult on the issue, and/or refer them to someone who is best able to help. If there is a serious problem about HoDs' safety, we are required to inform the appropriate institution.
- There will be no benefits that will be received by participants in this study. However, we hope that participation in this study will make HoDs feel good about themselves, appreciate and tolerate their understanding and experiences of school merger and learn more about their roles and responsibilities as well as the challenges they experienced, although, we cannot guarantee this.

Should you have any questions or concerns pertaining to this study, you can contact Dr Nthontho – 012 420 2499.

Yours sincerely

Researcher: Matshi Peter Mpiwa

Student number: 27627137

Telephone: 0795742151 **Email:** marpitmpiwa@gmail.com

Supervisor: Dr Maitumeleng Nthontho

Telephone: 012 420 2499 **Email:** maitumeleng.nthontho@up.ac.za

ANNEXURE B: APPROVAL LETTER FROM DEPARTMENT OF EDUCATION



Education and Sport Development

Department of Education and Sport Development
Departement van Onderwys en Sportontwikkeling
Lefapha la Thuto le Tihabololo ya Metshameko
NORTH WEST PROVINCE

Garona Building, Mmabatho
1st Floor, East Wing,
Private Bag X2044,
Mmabatho 2735
Tel.: (018) 388-3433
Fax.: 086-514-0126
e-mail: mothabanej@nwpg.gov.za

OFFICE OF THE SUPERINTENDENT-GENERAL

Enq. : Dr TA Phorabatho
Tel. : 018 388 3407

To: Dr. M Nthontho
Faculty of Education
University of Pretoria

From : Mrs. SM Semaswe
Superintendent-General

Date : 15 May 2018

PERMISSION TO CONDUCT RESEARCH: MR M P MPIWA

Permission is hereby granted to Mr. M P Mpiwa to conduct a research in the department as requested in your application letter dated, 13 May 2018, subject to the conditions that,

- He contact the Principals of his sampled schools with this permission letter.
- The research process will not hinder the general functionality of the concerned schools.
- The participation in your project will be voluntary.
- The principles of informed consent and confidentiality will be observed in strictest terms, and
- The findings of your research should be made available to the North West Department of Education and Sport Development upon request.

The department reserves the right to withdraw this permission should any ethical consideration be breached.

Best wishes,

Mrs SM Semaswe
Superintendent-General

Cc: Ms PK Rasetswane – Director: Strategic Planning Services



"Towards Excellence in Education and Sport Development"

ANNEXURE C: ETHICS CLEARANCE CERTIFICATE, UNIVERSITY OF PRETORIA



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

Faculty of Education

Ethics Committee

4 May 2018

Mr Maritshi Mpiwa

Dear Mr Mpiwa

REFERENCE: EM 18/02/13

This letter serves to confirm that your application was carefully considered by the Faculty of Education Ethics Committee. The final decision of the Ethics Committee is that your application has been **approved** and you may now start with your data collection. The decision covers the entire research process and not only the days that data will be collected. The approval is valid for two years for a Masters and three for Doctorate.

The approval by the Ethics Committee is subject to the following conditions being met:

1. The research will be conducted as stipulated on the application form submitted to the Ethics Committee with the supporting documents.
2. Proof of how you adhered to the Department of Basic Education (DBE) policy for research must be submitted where relevant.
3. In the event that the research protocol changed for whatever reason the Ethics Committee must be notified thereof by submitting an amendment to the application (Section E), together with all the supporting documentation that will be used for data collection namely; questionnaires, interview schedules and observation schedules, for further approval before data can be collected. **Non-compliance implies that the Committee's approval is null and void.** The changes may include the following but are not limited to:
 - Change of investigator,
 - Research methods any other aspect therefore and,
 - Participants
 - Sites

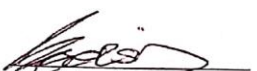
The Ethics Committee of the Faculty of Education does not accept any liability for research misconduct, of whatsoever nature, committed by the researcher(s) in the implementation of the approved protocol.

Upon completion of your research you will need to submit the following documentations to the Ethics Committee for your Clearance Certificate:

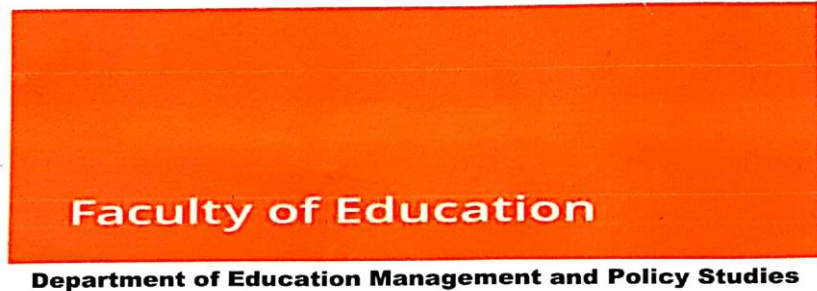
- Integrated Declaration Form (Form D08),
- Initial Ethics Approval letter and,
- Approval of Title.

Please quote the reference number **EM 18/02/13** in any communication with the Ethics Committee.

Best wishes


Prof Liesel Ebersöhn
Chair: Ethics Committee
Faculty of Education

ANNEXURE D: LETTER TO PRINCIPALS AND SCHOOL GOVERNING BODIES



3981 Monica Crescent
Unit 12
Mmabatho
2735

01 August 2018

The Chairperson of the School Governing Body
Dear Sir/Madam

Request for permission to conduct research at your school

I am a Master's student at the University of Pretoria in the Faculty of Education. I wish to apply for permission to conduct the study titled: "**Heads of Departments' experiences of school merger in the North-West province**" at your school. The purpose of the study is to explore how the HoDs in the North-West province experienced school mergers. The study intends to understand how school merger affected their psychosocial wellbeing and their roles and responsibilities as well as the challenges they experienced and how they approached such challenges. Once you understand what the study is about, you can decide if you want to grant such permission or not. If you agree, you will be requested to release a signed letter permitting the study to take place.

The process of field work is detailed below:

- The process will be in a form of semi-structured interviews as a way of collecting data. The HoDs will be requested to spend some time sharing their understanding and experiences of school merger.
- I as the researcher will be accompanied by my supervisor as the assistant researcher in the whole data collection process.
- If we are granted permission, we intend to be at the school for two sessions after school to avoid disruption of teaching and learning (the first day will be for research activities, which will take 45 to 60 minutes and one day for member checking 30 minutes).

- To ensure the anonymity and confidentiality of the participants, we will keep HoDs' names, the name of the school and contribution to the study private except if it is the HoD's wish to be named.
- We do not think anything bad or risky will happen to HoDs participating in this study. If problems do arise, they can speak to us and we will consult on the issue, and/or refer them to someone who is best able to help. If there is a serious problem about HoDs' safety, we are required to inform the appropriate institution.
- The HoDs in this study will not receive any benefits. However, we hope that participation in this study will make HoDs feel good about themselves, appreciate and tolerate their understanding and experiences of school merger and learn more about their rights and freedoms pertaining to processes and practices that affect them and their roles and responsibilities, although, we cannot guarantee this.

Should you have any questions or concerns pertaining to this study, you can contact Dr Nthontho – 012 420 2499.

Yours sincerely

Researcher: Maritshi Peter Mpiwa

Student number: 27627137

Telephone: 0795742151 **Email:** marpitmpiwa@gmail.com

Supervisor: Dr Maitumeleng Nthontho

Telephone: 012 420 2499 **Email:** maitumeleng.nthontho@up.ac.za

ANNEXURE E: PERMISSIONS FROM SCHOOLS



BOITSHOKO SECONDARY SCHOOL

PRIVATE BAG X 2049 MAFIKENG 2745 NORTH WEST PROVINCE S.A.
TEL. (018) 383 3636 ENQUIRIES : PRINCIPAL : S.S.MMUSI 083 771 7825

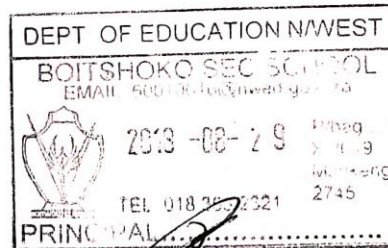
TO: MPIWA M.P

PERMISSION TO CONDUCT RESEARCH

Be informed that the school is granting your permission to conduct your research. You will meet with individual HOD to arrange appropriate/suitable time for your research.

Yours in education


Mmusi S.S (Principal)





STADT PRIMARY SCHOOL

P. O. BOX 219
MAFIKENG
2745
TEL/FAX: 018 392 4040
CELL: 082 257 8655
SCHOOL MANAGER: L. P. PETLELE

To: **Dr M Nthontho**
Faculty of Education
University of Pretoria

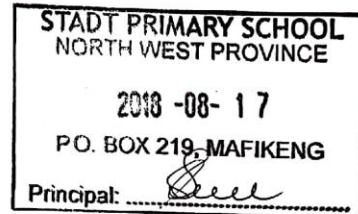
Date: 17 August 2018

PERMISSION TO CONDUCT RESEARCH: Mr M.P. MPIWA

The above mentioned school grant **Mr M.P. Mpiwa** permission to conduct a research in the school as requested in your application and subject to conditions set by the **North West Department of Education and Sport Development** as stipulated in the letter dated **15 May 2018** from **Mrs SM Semaswe (Superintendent-General)** and enquiries to be directed through to **Dr T.A. Phorabatho-0183883407**.

Thanks in advance

PETLELE L.P. (School Principal)



RAMAINA A PHETLHU
SECONDARY SCHOOL



Physical Address:

11968 Magogoe Central, Mahikeng, 2745

Contact Details:

Tel: 018 382 8860

Email: phetlhu.secondary@yahoo.co.za

Postal Address:

PO Box 24323, Magogoe, 2745

Enquiry: QOBOLO RMB

CELL: 082 742 8706 / 076 6033 346

17 AUGUST 2018

Sir

PERMISSION TO COONDUCT RESEACH: MR M. P. MPIWA

The SGB cordially informs your honor, Mr. Mpiwa M.P. your request of conducting Research at Ramaina A Phetlhu S.S has been acknowledged.

Therefore the Head of Department will be contacted for the research processed. The research process of merging two schools will not hinder the general functionality of the school.

Hoping the Researcher Mr. Mpiwa will feel free to visit Ramaina A Phetlhu S.S. to research the Head of Departments.

Thanking You In Advance.

Yours faithfully
School Manager
Ms. Qobolo R.M.B

NORTH-WEST

DEPARTMENT OF EDUCATION AND SPORT DEVELOPMENT



TETLANO SECONDARY SCHOOL

PRIVATE BAG X2064
MMABATHO
2735

E-mail: tetlanosecondaryschool@gmail.com; Tel: 018-3921462; Fax 0865431444; Motlhabeng Village;

Enq: T.G.Mere

Cell: 0823459114

Tel: 018 3921462

To: Dr M Nthontho

Faculty of Education

University of Pretoria

From: Ms T.G. Mere

Principal (Tetlano Secondary School)

Date: 17 August 2018

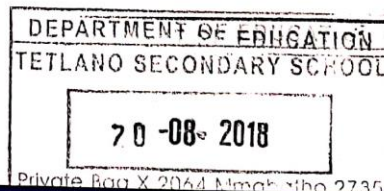
PERMISSION TO CONDUCT RESEARCH: MR M.P. MPIWA

Permission is hereby granted to Mr M.P. Mpiwa to conduct a research at our school under the following conditions:

- Strictly only Departmental Heads must take place in the study.
- Notional time must never be tempered with.
- Upon completion of the study, the findings should be made available to the school.

Regards

T.G. Mere (Principal)



ANNEXURE F: INTERVIEW SCHEDULE



Faculty of Education

Department of Education Management and Policy Studies

Interview schedule

Study title: Heads of Departments experiences of school merger in the North West province

Study purpose: to explore how you experience school mergers. The study intends to understand how school merger affected your psychosocial wellbeing, your roles and responsibilities and how you have approached the challenges brought to you by school merger.

Interview procedure: The interview will consist of nine questions of which you are not obliged to answer all of them should you feel uncomfortable to do so.

Note: There are neither wrong nor right answers in this interview.

Remember:

1. Everything we share and discuss will be treated as confidential and will not be revealed to a third party. I am interested in your personal understanding and experiences of how school merger has affected you personally, your roles and responsibilities as HoD and not in the expectations of you by the Department of Education and the school.
2. You are welcome to seek clarity should the need be.
3. Everything we share and discuss will be audio recorded.
4. You can stop participating at any time without giving any reason.

Are there any questions that you would like to ask for clarification before we start?

Interview questions

1. What is it that you understand about school merger?
2. How have you experienced school merger?
3. Which school were you in before the merger of schools?
4. How did the school merger affect you?
5. How were you prepared before you were moved to the other school?
6. In what way did merger of schools affect your work as HoD?
7. What kind of support did you receive and from whom?
8. How did the school merger change your role as the HoD?
9. What are your experiences in a new school?

Is there anything else you would like to share with regard to your experiences of how school merger has affected you personally, your roles and responsibilities as HoD?

Concluding remarks

Thank you for taking your time to share with this important and valuable information.

I kindly request you to avail yourselves for further clarity should I need it.

Should you have questions and/or additional information regarding this study/interview, do not hesitate to contact us.

