

Leadership development of Heads of Department in public primary schools

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DECLARATION OF ORIGINALITY

I, Willemien Strydom, declare that “Leadership development of Heads of Department in public primary schools” which I hereby submit for the degree Magister Educationis in Education Leadership at the University of Pretoria, is my own work and has not previously been submitted by me for a degree at this or any tertiary institution.

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ETHICS STATEMENT

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

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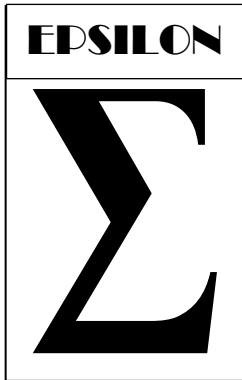
ABSTRACT

It is well known that leadership plays a key role in the overall success of school and learner achievement. Therefore, this multiple case study investigates what developmental programmes and training opportunities are in place to prepare HoDs to meet the demands of a formal leadership position. How these programmes are perceived by HoDs s also be outlined and analysed. The importance of the role that HoDs fulfil in schools is explored, as well as the importance of investing in their leadership development through formal and informal leadership developmental programmes. This qualitative study used interview data obtained from eight purposefully sampled recently appointed Heads of Department (HoDs) in public primary schools in Pretoria. This study outlined the importance of middle managers, such as HoDs and what measures need to be taken into account to ensure they are adequately prepared to meet expectations.

KEY WORDS

head of department, leadership development, Personnel Administrative Measures, school leadership, school management, mentoring, distributed leadership, experiential learning.

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This is to confirm that I have completed the language editing of the mini-dissertation Leadership development of Heads of Department by Willemien Strydom submitted in partial fulfilment of the requirements for the degree Magister Educationis in the Faculty of Education of the University of Pretoria.

Yours faithfully

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CHAPTER 1

INTRODUCTION

1.1 BACKGROUND

According to the Personnel Administrative Measures (RSA, 2016) it is expected of Heads of Department (HoDs) to teach classes, to be actively involved in extracurricular activities, enhance learning in their school and also to be responsible for managing their department effectively. In order to meet all these expectations, HoDs should be trained through developmental programmes to such an extent that they are able to not only function in their academic and administrative capacity, but also in their role as leaders and managers (Potgieter, Basson & Coetzee, 2011).

According to Naicker and Mestry (2013) research worldwide mainly focused on the role of principals in schools and tended to see leadership as a position or a person instead of focusing on all of the role players that should be actively involved in leading the staff and learners to better outcomes. For newly appointed HoDs to be equipped for their new role as leaders and managers, development programmes in which the skills and competencies of HoDs are developed should be in place in all schools. Leadership and management roles should also be clearly defined as some studies have found that the roles of HoDs are not always clearly defined and understood (Sullivan, 2013). For example, a study conducted by Zhang and Brundrett (2010) found that there is a general dissatisfaction with the generic leadership developmental programmes that are available and that by only focusing on curriculum content and not the application of the newfound knowledge they do not sufficiently prepare aspiring HoDs for the task at hand. By making use of a variety of developmental programmes, theory and practice should be linked (Sullivan, 2013) increase the leadership capacity of aspiring and newly appointed HoDs (Bush, 2009).

The effect of high-quality leadership and management on educational outcomes is clearly outlined in research from across the globe (Bush & Jackson, 2002). It is thus reasonable to believe that good leadership in a school will contribute to the success of a school and have an influence on learners' outcomes. According to Bush (2008), management and leadership in schools should be regarded as a separate profession

from teaching and therefore require separate and thorough preparation. These viewpoints support the notion that there is a need for leadership development of HoDs.

The success of any leadership developmental programme is based on whether there is a link between theory, practice and the personal needs of an individual. Sullivan (2013) found that by implementing leadership development programmes, teachers aspiring to become HoDs and newly appointed HoDs will be enabled to engage in leadership development and leadership learning that is life-long, contextual and continuous. Such programmes will prepare aspiring HoDs to meet the expectations of the education system and the community. It has been noted that many HoDs do not have the necessary skills and competencies on order fulfil their duties (Potgieter, Basson & Coetzee, 2011). In the South African context HoDs only need three years teaching experience as a Post Level 1 teacher to be considered for an HoD position (RSA, 2016). It is questionable whether the necessary skills and competencies expected of an HoD can be acquired through only three years of teaching, hence the importance and need for leadership developmental programmes for HoDs.

Despite numerous efforts to emphasise the importance of leadership development, training for leadership roles is often inadequate and uncoordinated (Bush & Jackson 2002) with little time allocated to focus on professional development in schools. It has become evident that there is a need in schools for leadership development infrastructure (Macpherson, no date) and standardised programmes that will enable aspiring HoDs and other leaders to accelerate their professional development and careers by employing better leadership practices. The participants' background, context and level of expertise should be taken into account when designing or implementing leadership development programmes as these programmes should be presented on a level relevant to the participant (Zhang & Brundrett, 2010). These prerequisites of a leadership developmental programme make the implementation and measurement of effectiveness of such a programme so much more challenging.

1.2 CONTEXTUALISING THE STUDY

The role of all school leaders has changed over time (Marishane, 2016). In particular, more responsibilities than ever before are being expected from HoDs (Javadi, 2014) which on the one hand are increasing expectations of HoDs and on

the other hand adding to the value of the contribution HoDs can make in schools. However, Thorpe and Melnikova (2014) argue that it remains challenging for schools to utilise HoDs in such a way that they effectively contribute to a school's success. By utilising HoDs effectively and equipping them by means of leadership development will empower and enable HoDs to have the competencies needed to meet all the expectations of being an HoD (Bush, 2009).

The Personnel Administrative Measures (PAM) contains the prescriptions regarding the roles and responsibilities of HoDs in South African public schools. Listed below are a few of these responsibilities that will require knowledge beforehand and that will require training to develop the skills necessary to meet expectations (RSA, 2016: 36-37):

- Being in charge of a phase or learning area;
- Developing policies within the department;
- Coordinating evaluation and assessment;
- Being able to give guidance with relation to subject, method and techniques;
- To control the work of educators, reports, mark sheets, tests, examinations as well as the administrative responsibilities of staff members;
- To participate in performance appraisal of staff;
- Setting a budget for a department;
- Setting up timetables; and
- To meet with parents and discuss the progress of their child.

To perform the core duties and responsibilities outlined in the Personnel Administrative Measures (PAM) (RSA, 2016), training and preparation to meet these expectations should be integrated into a leadership developmental programme for aspiring teachers before their appointment as an HoD. Failing to do so will lead to HoDs who do not have the necessary knowledge, skill or attitudes to execute their responsibilities and fulfil their roles (Saul, 2019).

Another important aspect regarding the appointment of HoDs in South Africa is the minimum requirements for being appointed as an HoD. According to the Personnel

Administrative Measures, potential candidates for an HoD position must comply with the following minimum criteria (RSA, 2016):

- A recognised and applicable three or four year teaching qualification.
- A registered member of the South African Council for Educators (SACE).
- Knowledge regarding teaching and assessment.
- Curricular and co-curricular skills.
- Interpersonal, administrative and communication skills.
- Three years teaching experience.

It has been noted in previous studies that HoDs are often appointed based on their teaching prowess rather than their skills and aptitude for leadership and management (Javadi, 2014). Considering the minimum requirements for an HoD to be appointed in a public school, most HoDs do not necessarily possess the leadership abilities or skill set required to execute their responsibilities.

The minimum requirements as set out in the Personnel Administrative Measures reinforce the urgency for the need for leadership development to be in place in schools to prepare HoDs for the task ahead. These requirements are what one would expect from any teacher and none of the criteria demands high standards of leadership and management expertise. Only meeting these requirements will probably not lead to an HoD being able to successfully manage their department (Saul, 2019) or be competent enough to fulfil the core responsibilities as set out in the Personnel Administrative Measures (PAM).

Primary school HoDs are also, according to the Personnel Administrative Measures (PAM), expected to teach 85% to 90% of their allocated periods. HoDs are generally challenged to execute their additional leadership and management responsibilities while spending 85% to 90% of their time at school in the classroom. If HoDs are not properly prepared, being appointed without having a clear understanding of the job expectancies or without any experience or exposure to a heavier workload, it cannot be expected of them to fulfil such a demanding position. This attests to the crucial need and importance of leadership development of HoDs in schools.

In a primary school, responsibilities and leadership tasks can be delegated and distributed to different HoDs in the same phase, given the fact that there are more

than one HoD in the post allocation. The number of HoD positions allocated in a school is determined by the number of learners enrolled. High enrolment numbers will lead to more HoD posts being allocated, whereas lower enrolment numbers will lead to fewer HoD posts being allocated. In schools where there are more than one HoD position in a phase; schools have the luxury to share leadership tasks and have room for mentorship or induction initiatives where leadership development can easily take place. However, if there is only one HoD in a phase, such an individual will have to assume more responsibilities. This individual will not only have an enormous workload, but also no chance of gradually learning from other HoDs.

All these variables play a role in the success of an HoD when it comes to running a department effectively. There is thus a need for leadership development of HoDs, not only because they play an important role in the leadership and management of a school, but also because based on policy documents, a lot of skills are required of them. With the role of HoDs being recognised as a formidable resource that contributes to school effectiveness (Javadi, 2014), aspiring and newly appointed HoDs should be adequately equipped through leadership development programmes to meet all the requirements set out in the Personnel Administrative Measures (PAM).

1.3 RATIONALE FOR THE STUDY

As an HoD with five years' experience at a small primary school, I was appointed with six years of teaching experience. Even though I was appointed at the same school where I was working as a Post Level 1 teacher, I can honestly admit that I had no idea what was expected of me. The roles and responsibilities were delegated to me on a day by day basis, and I only had my past experiences to rely on.

Against the above background, school leadership has become a policy priority across the globe as countries adapt to the changing demands of education (Sullivan, 2013). In the past few years there has been a shift in research and there is a growing emphasis on the importance of strong leaders as they are needed in the ever-changing environment of education (Du Plessis & Eberlein, 2018). Therefore, because of the increasing recognition that schools require effective leaders to improve school outcomes, it is of the utmost importance that schools examine leadership development programmes.

Naicker (2011) states that there is a movement away from the concept that principals are the sole leaders of schools and single person leadership is being challenged. This shift in the approach to leadership has caused the responsibilities of leadership to fall on middle management and HoDs. The roles of many of these managers, especially those of a Head of Department are not clearly defined or understood (Sullivan, 2013). If a newly appointed HoD does not understand what is expected of him or her before accepting the position and making the transition from teacher to HoD, it can influence a school negatively if these competencies and skills are lacking (Potgieter, Basson & Coetzee, 2011). In addition, Sullivan (2013) clearly outlines the importance of teachers who are aspiring HoDs to receive the proper pre-service, in service and informal interventions that will allow them to perform their jobs and meet the requirements of their jobs.

1.4 PROBLEM STATEMENT

Many young South African teachers are appointed as HoDs based on their teaching prowess rather than their leadership and management competencies, not knowing exactly what the job entails or what competencies will be expected of them. Individuals who find themselves in a situation where they lack role clarity or come to the realisation that they do not have the required skills to do their job are forced to take matters into their own hands and chase their aspirations by means of post graduate studies or blindly continue, hoping they muster the skills needed. It has, however, been noted in research conducted by Zhang and Brundrett (2010) that leadership development is a critical task that should not be left only to government and external agencies. Educational leaders, including HoDs should take responsibility for their own life-long and contextual learning. In the 2013 National Education Evaluation and Development Unit Report (NEEDU) it is emphasised that school leaders who are confident and effective managers play a vital role in schools (NEEDU, 2013: 81) and for this reason the leadership development of HoDs should be maintained and made a priority.

However, it is important to note that interventions for leadership development take time (Bush, 2009) and results will not be visible immediately. It is also of the utmost importance to recognise that no programme or reading can prepare an HoD for the rigours of their professional activity (Zhang & Brundrett, 2010). The National Education Evaluation and Development Unit (NEEDU) Report of 2012 clearly

stipulates that it is the responsibility of school leaders to ensure that professional development in schools occurs frequently in a sustainable manner (NEEDU, 2012: 81). Professional development includes leadership development of HoDs and the responsibility rests on members of senior management to ensure that HoDs are prepared for their future role in the organisation. The findings of a study like this can have a great impact on schools and other role players in the leadership development of HoDs.

1.5 THE PURPOSE OF THE STUDY

The purpose of this study is to explore the leadership development experiences of newly appointed HoDs prior to and immediately after their appointment as HoDs.

1.6 RESEARCH QUESTIONS AND SUB-QUESTIONS

Based on the research problem, the following research question has been formulated:

What are the leadership development experiences of recently appointed Heads of Department (HODs) in public primary schools?

In support of the above-mentioned research question the following sub-questions will also be addressed in this study:

- What learning opportunities are provided to aspiring and newly appointed HoDs in public primary schools?
- What challenges do aspiring and newly appointed HoDs face in public primary schools?
- What competencies do newly appointed HoDs need to acquire to overcome the challenges they experience?

1.7 THEORETICAL FRAMEWORK

This study was guided by Kolb's Experiential Learning Theory. Kolb's theory is a holistic model that focuses on the learning process as well as a multi-linear model of adult development (Kolb, Boyatzis & Mainemelis, 2014). Experiential learning can be defined as a process that enhances learning by constructing knowledge due to contextual demands (Kolb & Kolb, 2009). This theory is ideal for developing leadership skills and competencies of aspiring HoDs as it involves learning through

experience and by doing. Zhang and Brundrett (2010) state that leaders arise out of a variety of informal routes, implying that knowledge can be gained through experience. The Experiential Learning Theory is based on a process of learning driven by the dual dialectic of action and reflection and experience and abstraction (Kolb & Kolb, 2009) therefore emphasising the fact that individuals learn by doing through integrating the functions of feeling, thinking, perceiving and behaving (Kolb & Kolb, 2009). Individuals are provided with encounters from which they can learn and develop (Guthrie & Jones, 2012).

The Experiential Learning Theory is based on a four-stage learning cycle (Kolb, Boyatzis & Mainemelis, 2014) that uses concrete experience as the basis for all observations and reflections. Once the reflection has been done, abstract concepts are assimilated, forming the basis on which new actions can be drawn. New implications are then actively tested, guiding the creation of new experiences (Kolb, Boyatzis & Mainemelis, 2014).

According to Bush (2008), there are significant evidence that successful leadership in a school is of critical importance if good outcomes for learners is the goal. By using experiential learning as a base of learning and allowing school leaders and aspiring HoDs to learn through doing and reflecting on their own behaviour and the behaviour of others, the learning culture in a school will be promoted. Through this method of leadership development learning will be life-long, continual and contextual (Sullivan, 2013). Huber (2013) emphasises that continuous professional development plays an important role in the development of aspiring leaders.

The success of any leadership development programme relies on the link between theory, practice and the needs of the individual (Sullivan, 2013). By making use of experiential learning the focus will be on utilising the learning space where learning occurs between the individual and the environment (Kolb & Kolb, 2009). This approach will also take the real working context of aspiring HoDs into account because there will be appropriate, complex and authentic learning experiences (Huber, 2013) for them to learn from and reflect on. Kolb and Kolb (2009) believe that learning occurs from transitions between the person and the environment which will constantly be the case if the theory of experiential learning is enforced in the development of aspiring HoDs.

Some of the obstacles in developing the leadership skills of aspiring HoDs are that training for leadership roles are inadequate and uncoordinated (Bush & Jackson, 2002) and there is a minimal amount of time available in a school environment to dedicate to training or leadership developmental programmes. By making use of experiential learning, aspiring HoDs will be able to learn on the job as the most substantial experiences normally take place on the job in the workplace, rather than during workshop off-the-job training (Zhang & Brundrett, 2010). Experiential learning also relies on the fact that concrete and complex problems are encountered in everyday practice and that these are used as a starting point to involve aspiring leaders in the problem solving processes (Huber, 2013) and as a result also in the development of their skills as aspiring HoDs.

Another factor that influences the success of the attainment of leadership skills in aspiring HoDs is that the participants' level of expertise, context and background should be considered when planning and preparing leadership developmental programmes. Experiential learning will not only create the possibility for aspiring HoDs to reflect on their own strengths and weaknesses (Huber, 2013), but will also draw on aspiring HoDs' individual beliefs, examine and test them and eventually integrate them with new ideas (Kolb & Kolb, 2009). Leadership learning is the process in which a professional interacts with the social experiences encountered in the workplace (Zhang & Brundrett, 2010). By using the Experiential Learning Theory in this study, it was possible to gather data from HoDs that are working in the environment that is being researched.

The Experiential Learning Theory has two goals. The first goal is to learn the specifics of a particular subject (Kolb & Kolb, 2009), which in this case will be on how the leadership development takes place in aspiring HoDs. The participants in this study not only became aware of their own leadership development but were also influenced by the principles of experiential learning in order to provide data that allowed for the construction of new knowledge pertaining to my frame of reference as researcher. The second goal of the Experiential Learning Theory is to learn about one's own learning process (Kolb & Kolb, 2009). The participants were made aware how their leadership learning manifested itself.

1.8 RESEARCH SCOPE

This research focused on how HoDs experienced their leadership development on assuming the position of HoD. Eight HoDs in public primary schools in Pretoria participated in the study, all who have less than four years' experience as an HoD. The research focused on their perceptions and experiences and did not serve as a measurement of professional development programmes or training initiatives that are in place in schools.

1.9 RESEARCH APPROACH

1.9.1 Research methodology

This study made use of a qualitative research approach as it attempts to understand the participants perspectives from their own point of view in their own natural setting (Thanh & Thanh, 2015). The research questions in this study are exploratory and aim to answer questions pertaining to a certain phenomenon (Maree, 2016), namely the leadership development of aspiring and newly appointed HoDs.

1.9.2 Research design

A multiple case study design was followed as it allowed me to use a small number of participants to compare differences and similarities across all cases (Maree, 2016). A multiple case study not only allowed me to seek answers from participants in their natural setting, but also allowed findings to be replicated across different settings (Maree, 2016).

In addition, a multiple case study design allowed me to seek answers within a specific context (Vohra, 2014) and to be selective (Noor, 2008) in the process. I specifically focused on HoDs in public primary schools in Pretoria and compared their experiences and perceptions which allowed for a deeper understanding of the phenomenon under investigation.

1.9.3 Sampling

Participants were selected through purposive, homogenous sampling as all HoDs that took part in this study work at primary schools in Pretoria and were recently appointed as HoDs. The criteria stipulated that participants needed to have less than four years' experience as an HoD. This study used only eight participants and focused on their perceptions and experiences.

1.9.4 Data collection and data analysis strategies

Data were primarily collected by means of semi-structured interviews. An interview schedule was used to guide the interviews. The data obtained from the interviews were transcribed and thereafter they were thoroughly analysed. Reoccurring themes and trends were identified and were brought in relation to the research questions of this study as well as already existing literature.

Secondary data gathered form textual data focused on policy documents such as the Personnel Administrative Measures (PAM) as well as reports from the National Education Evaluation and Development unit (NEEDU). This data were used in addition to the data obtained from the interviews to compare the roles and responsibilities stipulated in these documents with the experiences of participants.

1.10 OUTLINE OF STUDY

Chapter 1 provides the introduction to the study and contains discussions on the problem statement, the rationale for the study, research questions, theoretical framework and the methodology and research design which were employed in the study.

Chapter 2 of this study contains the literature review and focuses on literature pertaining to the roles of HoDs, as well as the importance of quality leadership in schools. Literature on leadership development of HoDs is also discussed.

The research methodology and research design used in this study are presented in Chapter 3. In Chapter 4 I present and discuss the data and findings of this study. The dissertation is concluded with Chapter 5 in which I provide answers to the research questions, offer recommendations and provide suggestions for further research.

CHAPTER 2

LITERATURE REVIEW

2.1 INTRODUCTION

In the previous chapter I presented the research problem and posed relevant questions and stated the purpose of the study. The theoretical framework of the study was discussed. I then proceeded to introduce the methodology and research design for this study. The chapter was concluded with an overview of the structure of this dissertation.

In this chapter I will present a review of relevant literature applicable to leadership development of heads of departments (HoDs) in public schools. This chapter attempts to shed some light on various aspects regarding the leadership development of HoDs in public schools and more specifically in Pretoria, South Africa. Various studies have been conducted on the role of HoDs and this chapter will contribute to literature by discussing the responsibilities and expectancies set out for HoDs and the significance of their role in schools.

The skills and competencies that are expected of successful HoDs in the fulfilment of their role as middle managers in the school, will also be thoroughly outlined. This chapter will also elaborate on the challenges HoDs are currently facing in public schools and identify underlying obstacles that impede the HoDs' capacity as effective educational leaders. Lastly, this chapter will look at policy relating to the requirements with regards to assuming the position of an HoD.

2.2 BACKGROUND

Globally there is a trend that leadership in schools should not only be confined to principals, but that it is rather something that should be widespread and distributed (Hermann, 2016). Leadership responsibilities in schools are also changing and are becoming more complex to such a degree that it is impossible for a principal to be the only leader and decision maker in a school (Marishane, 2016). The change in the responsibilities of the principal together with the increased pressure inevitably lead to the delegation of tasks and an emergence of greater influence by HoDs (Javadi, 2014). HoDs in the 21st century thus have a greater responsibility on their shoulders when it comes to leadership in schools. Basset (2016) confirms this increase in work

pressure on senior educational leaders by stating that this change has resulted in the delegation of responsibilities to other levels in the school hierarchy – such as heads of departments.

The field of education is full of challenges (Ghavifekr, Hoon, Ling & Ching, 2014) with teaching becoming more of a challenge each day due to the influence of the media on children, as well as a paradigm shift in the significance of education (Leask & Terell, 2013). However, HoDs in schools should be utilised in such a manner that they can contribute to the improvement of a school's effectiveness (Thorpe & Melnikova, 2014). It is increasingly becoming the responsibility of the HoD also to respond to the demands of the school system (Javadi, 2014) and to accept and execute their new set of responsibilities.

Because the behaviour of leaders has a major impact on people, it is important to note that HoDs have an important role to fulfil as they are the main channel of communication between the staff and the principal (Du Plessis & Eberlein, 2018). HoDs can also influence school policies in the fulfilment of their role by ensuring school improvement. They are hence on the forefront of impacting school standards in a positive way (Leask & Terell, 2013.)

Bush and Glover (2004) emphasised the role and responsibilities of an HoD and stated that it should not be underestimated. This role is also ever changing as it evolves as quickly as school systems evolve. Equipping aspiring HoDs through leadership development programmes with a skill-set that will empower them to adequately do their jobs will result in HoDs having the competency to perform their roles (Bush, 2009) and influence the educational system in a positive manner. Unfortunately, the current state of matters is that leadership development is mainly focused on the senior management of schools (Saul, 2019). By neglecting the middle management such as HoDs, their efficiency and level of competence as leaders and managers will be jeopardised.

It is well known that education is a crucial element of a country's growth and degree of success (Ghavifekr, Hoon, Ling & Ching, 2014). Most teachers are not trained in decision making outside their classrooms (Saul, 2019). Therefore, aspiring and newly appointed HoDs need to develop new qualities and skills that are not part of initial teacher training to empower them to be successful educational leaders (Snoek,

2014). There is thus a need in schools to have structures in place that are effectively creating vibrant leaders that can meet the changes and challenges of the education system (Saul, 2019). This can be achieved only when proper leadership development programmes are in place for all levels of leaders in the school hierarchy.

2.3 THE IMPORTANCE OF LEADERSHIP AND MANAGEMENT IN SCHOOLS

Since the late 1990's, numerous studies have been conducted to prove that the leadership of a school has a great influence on learner outcomes (Bush & Jackson, 2002; Bush, 2008 and 2009, Ghavifekr, Hoon, Ling & Ching, 2014, Marishane, 2016, Leithwood, 2016). According to Rhodes and Brundrett (2009), the leaders of a school have a significant influence on the quality of teaching. Educational leaders can improve school outcomes by influencing the capability levels of teachers (Ghavifekr, Hoon, Ling & Ching, 2014), therefore making a substantial difference to learner attainment, globally as well as in South Africa (Marishane, 2016). This statement is reinforced by research done by Mårtensson and Roxå (2016) who emphasised that sustainable development and responsibility for teaching not only reside with the teachers at a school, but also with the leadership and management of a school.

Some researchers like Bush and Jackson (2002) even go as far as to contend that high quality leadership is one of the most important requirements of successful, high performing schools. Saul (2019) further states that the life-long influence of a country's education depends on the effectiveness of the management system in schools. School effectiveness is defined by Javadi (2014) as the ability to teach learners in such a way that they will be ready to deal with the various challenges that their future hold.

Educational leaders do not have an influence on learner performance and efficiency of a school environment only. They impact the way in which educators teach, how they are managed, as well as on the commitment of teachers (Marishane, 2016). When educational leaders carry out their responsibilities effectively, both learners and teachers will be motivated (Ghavifekr & Ibrahim, 2014). By setting high standards for teachers they - the teachers - will commit to the task at hand and do their work to the best of their capability (Ghavifekr & Ibrahim, 2014), which will have

a positive influence on learner achievement, their department's efficiency as well as whole school effectiveness (Saul, 2019).

For leadership to be classified as of high quality, leaders should be proactive, courageous and decisive in decision making (Bush & Jackson, 2002). Schools are key elements in any educational system and therefore need experienced and equipped leaders with a positive attitude. Educational leaders should also possess the ability to encourage cooperation and communication between staff members, stake holders and learners (Marishane, 2016). These are all skills that need to be focused on and developed, as leadership is a critical component in system building (Bush & Jackson, 2002) and will lead to better school outcomes and improved learner achievement.

The need for good leaders in education is greater due to the technology boom of the 21st century that led to the school environment becoming increasingly diverse and complex (Ghavifekr & Ibrahim, 2014). Educational leaders face diverse challenges (Kalargyrou, Pescosolido & Kalargiros, 2012: 26) on a daily basis as the environment of education is of such nature that it is forever changing. According to Bush and Jackson (2002), individuals who find themselves in leadership positions in education will constantly need to call on their own reservoir of expertise and experiences to find solutions to complex problems – especially if they want to thrive as a school and as educational leaders (Bush, 2008). Educational leaders are in the ideal position to make sure collaboration between all stakeholders takes place to guarantee effective schooling (Day, Gu & Sammons, 2016).

Because the behaviour of a leader has such an immense impact on people (Bush & Jackson, 2002), it is important for schools to have a leadership development infrastructure in place that will enable aspirant leaders to plan and accelerate their leadership development (Macpherson, no date). Du Plessis and Eberlein (2018) also argue that for the same reason, management should structure and lead systematic development opportunities in such a way that teachers can better themselves with the focus being mainly on leadership development. Working with people can be challenging and the role of an educational leader is not limited to caring about the content of the syllabus only, but it is also about caring for the people who make it work (Ghavifekr, Hoon, Ling & Ching, 2014). It is important to have leadership

development programmes in place to facilitate individual and collective efforts to achieve shared goals and the vision of the organisation (Marishane, 2016).

Bush (2008) is of the opinion that school leadership and management are parallel, if not separate, professions that require specific preparation. It is clear that leadership makes a difference in the effectiveness of schools, which led to a national and global increase in the emphasis on school leadership (Zhang & Brundrett, 2010).

The importance of the role of HoDs in bringing change and improvement in a school, is well recognised (Thorpe & Melnikova, 2014). Lately schools rely more on the managerial competencies of HoDs (Saul, 2019) as they make a difference in the performing of duties within a department and school, therefore having a more direct influence on school performance (Saul, 2019). Basset (2016) emphasises the fact that the main responsibility of HoDs is to lead teachers by being the link between the teaching staff and senior management. Utilising the competencies of educational leaders such as HoDs will enhance school effectiveness (Javadi, 2014), because all leaders matter in relation to quality improvement of a school (Eacott & Asuga, 2014).

However, for these competencies to influence teaching and learning, HoDs must be trained to be leaders and managers, because their leadership and managerial skills are effective tools to increase the commitment of teachers (Marishane, 2016). A climate that promotes the effectiveness of HoDs should be instilled, as it will enhance school effectiveness (Javadi, 2014) and it emphasises the fact that the middle management of a school is instrumental to its success.

Mårtensson and Roxå (2016) are of the belief that leaders in education are responsible for all aspects regarding teachers. With 45% of principals admitting that their workload is unmanageable (Bassett, 2016), it is of the utmost importance for the leadership in a school to be of a high quality in order to generate capability of everyone in a leadership position and to increase performance (Bush, 2009). Knowing that there is no single leadership formula to achieve success (Day, Gu & Sammons, 2016), it becomes clear that the leadership within a school is a critical factor in explaining the variation in learner outcomes between schools (Day, Gu & Sammons, 2016). The workload of educational leaders, including the HoD, is becoming more complex, extensive and challenging (Basset, 2016) and all schools should make leadership and management development their top priority.

2.4 THE DIFFERENCE BETWEEN LEADERSHIP AND MANAGEMENT

Although leadership and management overlap in an educational context, it is of the utmost importance to allow equal prominence for both in schools if efficiency and the attainment of goals are the objectives (Bush, 2008). Potgieter, Basson and Coetzee (2011) also confirm that leadership and management are integrated in an academic context, but one should remember that there is a difference between leadership and management. Even though leadership and management can be distinguished from one another theoretically, these two roles co-exist in the same person and position (Marishane, 2016).

Bush (2008) stated that leadership is a process of influence as well as a set of behaviours performed by an individual. Leadership is also seen as a complex process between people engaged in dynamic interaction in order to achieve common goals (Mårtensson & Roxå, 2016). A leader can also be defined as someone who is grounded in firm personal and professional values. According to Potgieter, Basson and Coetzee (2011), leadership is a quality that an individual brings to the position and is not necessarily part of the job description. Leaders should be utilised for their influence on staff members rather than just acting as a figure of authority. Leadership is not a leader acting alone, but rather a group responding to a leader's actions (Mårtensson & Roxå, 2016). Leaders tend to invest in their work emotionally and would rather shape the ideas of others instead of just acting in response (Marishane, 2016). Whereas the focus of educational leaders often lies in inspiring and developing people, other leadership activities include acting as counsellor, motivator and coach (Saul, 2019) of staff members through challenging times.

Leadership has been thought of as an inborn personality trait, but in the middle of the 20th century leadership scholars began investigating leadership as being bound to the context in which it occurs. Clearly school leadership can under no circumstance be separated from the context in which a school operates (Marishane, 2016). Schools are dynamic and complex entities (Kosgei, 2015), because it involves a variety of role players with different personalities, numerous processes and activities, set structures and different resources as well personal goals unique to each school and staff (Marishane, 2016). Leadership is thus based on individual behaviour and there is a definable set of skills and behaviours that can be learnt and developed (Bush, 2008), but it cannot be separated from the context in which it operates.

Successful school leaders should therefore be able to adapt their behaviour to the context of a school and make optimal use of staff and set attainable goals within the reality of the context. It is essential to realise that just as the context determines the manner in which school leaders lead, it is also true that the leadership of a school has an impact the internal and external context of a school (Marishane, 2016).

Where educational leaders often focus on inspiring and developing people, management on the other hand can be defined as a set of activities directed towards efficient and effective utilisation of organisational resources in order to achieve organisational goals (Bush, 2008). This is achieved through maintenance activities via paper systems, administration and procedures that are in place in order to achieve goals (Kerry, 2005) and solve problems (Saul, 2019). Management is also concerned with the internal operation of an educational institution (Bush, 2008) and is an executive function that is in place to carry out and ensure implementation of policies. Managers deal with challenges and solve problems without getting emotionally involved (Marishane, 2016) and only concentrate on the logistical and administrative issues regarding subject development, planning, supervision, conflict resolution, delegating of responsibility, time management and mentoring of subject teachers (Saul, 2019).

Even if leadership and management have distinct features, both are equally important when it comes to influencing people, achieving collective goals and dealing with people (Marishane, 2016). None of these aspects should be overlooked or undervalued, as managers are needed for their objective perspective and leaders are needed to share their vision and commit to changes and accountability (Marishane, 2016) as well as influencing the capacity of teachers (Ghavifekr, Hoon, Ling & Ching, 2014).

2.5 THE ROLE OF THE HEAD OF DEPARTMENT (HOD)

The position of a school leader who is in daily and direct contact with teachers as well as the members of the senior management team, such as the principal (Thorpe & Melnikova, 2014) is referred to as a Head of Department (HoD). Depending on the literature and the local and international context, HoDs can also be referred to as faculty leaders, departmental heads, learning area heads, middle leaders (Basset, 2016) or middle managers, as they are the ones who hold a formal role and serve as

members of the school's middle management team (Marishane, 2016). In this study they are referred to as Heads of Department (HoDs).

It is important for all aspiring (and current) HoDs to understand what their role entails in order to make the transition from teacher to HoD and that their new role will be an administrative, management, leadership (Potgieter, Basson & Coetzee, 2011) and academic role (Saul, 2019). It will be expected of an HoD to not only perform in their academic capacity, but also as a leader and manager (Potgieter, Basson & Coetzee, 2011). Hence, there is more responsibility to this position than just being a teacher. HoDs are in most cases former teachers who were promoted to supervise teachers (Marishane, 2016) and are therefore in a powerful position to exercise considerable influence and leadership over their colleagues (Leithwood, 2016). They should, according to Leask and Terell (2013), also realise that as the HoD, they have a wider role to fulfil.

It is important to note that even though there are many dimensions to an HoD's role, many of the functions do not necessarily only fall in one subcategory. Saul (2019) reinforces this by stating that HoDs have managerial and academic capacity. He also states that the HoD has a dual role of being both teacher (academic role) and administrator. Basset (2016) defines the role of an HoD in much broader terms by stating that the role is extremely complex and varied and everything in between is done to effectively lead and manage a department. However, most of the roles of an HoD can be divided into four dimensions.

2.5.1 The academic role of the HoD

The core business of schools is that of teaching and learning (Bush, Joubert, Kiggundu & Van Rooyen, 2009) which makes the academic role of an HoD an essential part of their job description. One can say that HoDs are responsible for everything related to teaching and learning outcomes (Marishane, 2016). Being responsible for teaching classes themselves, they serve as the ideal departmental representative (Saul, 2019). According to the Personnel Administrative Measures (RSA, 2016), HoDs in South African schools should engage in class teaching as it is required by the school. This action includes assessing and recording marks of learners. In order for the HoD to fulfil this requirement, they need to be subject specialists in charge of monitoring the quality of teaching of their department's

subject teachers to ensure consistency in respect of curriculum interpretation and implementation and the effectiveness thereof (Javadi, 2014), as well as the completion of learner assessment (Saul, 2019).

The consistent management of the curriculum to ensure that it adheres to current policies set by the Department of Basic Education is another big responsibility of the HoD (Marishane, 2016). This is just one of the reasons why an HoD needs to be a subject specialist. According to Ghavifekr and Ibrahim (2014), HODs are a source of support and reliance for teachers when problems arise in respect of teaching and learning, as they are also responsible for promoting the proper education of all learners (RSA, 2016).

HoDs should not only take the responsibility for the induction of new staff members, but they are also largely responsible for the professional development (Saul, 2019) of the staff members in their department, as their level of competence will have a major and direct influence on their teaching capabilities and therefore on learner outcomes. When an induction programme has value and is managed effectively by an HOD, it can have a positive influence on teacher satisfaction and the effect a teacher has on students (Stanulis & Flodden, 2009). In cases where HODs are supported by principals and senior management, professional development is more likely to take place effectively (Du Plessis & Eberlein, 2018). The induction process should include observing the teachers in the department by regular visits to their classes and to guide them to utilise a wider variety of teaching strategies (Roberson & Roberson, 2009). Regular and structured feedback is also essential (Roberson & Roberson, 2009), as it will allow teachers to improve, thereby contributing to their professional development (Roberson & Roberson, 2009). Professional development activities like these that relate directly to classroom responsibilities of educators are essential (Du Plessis & Eberlein, 2018) as it improves the overall standard of teaching and learning. HoDs are in the position to make a significant contribution to the professional development of the teachers in their department as they can improve the competences of teachers on a continuous basis, as their role is also developmental (Du Plessis & Eberlein, 2018).

Improving the teaching environment to enhance teaching and learning (Ghavifekr & Ibrahim, 2014) forms part of an HoD's academic role. HoDs are also responsible for liaising with the teachers to coordinate intervention strategies for learners

(Marishane, 2016). This can be achieved through HoDs coordinating assessment, taking charge of and responsibility for phases and/or learning areas, as well as guiding staff regarding the latest techniques and approaches regarding teaching methodology (RSA, 2016).

2.5.2 The administrative role of the HoD

The Personnel Administrative Measures (RSA, 2016) stipulates that South African HoDs are responsible for the effective functioning of a department and this entails various functions. These functions include managing and coordinating work schemes, responsibilities regarding budgets as well as the regulating and provision of stock like textbooks and subject specific equipment (RSA, 2016). As administrators, HODs are accountable for the effective functioning of their respective departments (Marishane, 2016). The reason why some departments are more effective than others is close attention to the administration within the department (Mårtensson & Roxå, 2016). Day to day activities such as timetabling, managing staff welfare issues, acting as secretary during staff meetings, as well as being the key person in the coordination and planning of fire drills also form part of the administrative role of a South African HoD (RSA, 2016).

HoDs must also ensure that all relative procedures and policies are followed and executed by teachers in their departments (Leask & Terell, 2013). Further duties also include controlling and checking mark sheets, moderating exam papers (Basset, 2016) and overseeing reports (RSA, 2016) in an attempt to maintain the standard set out by the school. It is expected of HoDs to be experts in both recordkeeping and bookkeeping (Saul, 2019). HoDs are the link between senior management and teachers and therefore the only ones able to translate policy adopted by senior management into feasible and practical practise within a classroom (Basset, 2016). HoDs are also expected to act on behalf on the principal in his or her absence (RSA, 2016) and should therefore be knowledgeable regarding policy matters and the operational management of a school. HoDs should thus be able to work with and through others for their departments to function optimally.

2.5.3 The managerial role of the HoD

It is the responsibility of any manager to make sure that a department is functioning smoothly. For HoDs it is no different – they should structure and coordinate their

department to maximize productivity as well as ensuring that all staff members are synchronized and working towards the same collective goals (Saul, 2019). Basset (2016) is of the opinion that HoDs remain accountable for overseeing the activities in their departments. These include performance management of staff members, behavioural management of learners and teachers, as well as classroom observation and mentoring of teachers (Basset, 2016).

To be an effective manager, HODs should be capable of bringing order within their department, as well as resolving conflict in a manner that advocates teamwork by raising staff morale (Saul, 2019). The day to day activities expected of an HoD vary from being a problem solver, financial manager, time manager and performance manager to being an agent of change and managing the diversity of a department (Saul, 2019). Appropriate delegation of tasks or functions by an HoD will also have a positive influence on academic performance (Saul, 2019).

2.5.4 The leadership role of the HoD

A study conducted by Leithwood (2016) found that HoDs have a bigger impact on students and learning than leaders in senior management positions, due to the fact that they are the bridge between the principal, teachers and learners (Ghavifekr, Hoon, Ling & Ching, 2014). As HoDs have the power to dramatically influence the performance within their department (Thorpe & Melnikova, 2014), it is clear that sustainable and effective development relies on the continuous engagement of the HoD (Mårtensson & Roxå, 2016). A crucial part of the leadership role of the HoD is to take staff and learners to a better future (Ghavifekr, Hoon, Ling & Ching, 2014) by working with the senior management team. HoDs can develop the staff in their departments in such a way that the vision and mission of the school is reached (Du Plessis & Eberlein, 2018). The 2013 report of the National Education Evaluation and Development Unit (NEEDU) states that HoDs should also structure and lead staff through systematic development opportunities (NEEDU, 2013: 79), thus acting as true leaders. This implies that they must be able to serve as mentors and coaches to teachers in their departments.

The leadership role of the HoD also includes serving as mentor, motivator, advisor and counsellor (Saul, 2019). Leaders should be able to lead a team easily, to set and reach a collective vision and to take responsibility for successes and failures within

their departments (Thorpe & Melnikova, 2014). Botha and Triegaardt (2014), supported by Liang and Sandmann (2015), state that leadership can be seen as a joint social process of guiding the behavior of others towards the attainment of goals, such as reaching the vision of a school. It is the responsibility of an HOD to make sure every role player in the school is on the same page regarding goals set by the school in terms of curriculum and assessment. This can be achieved by HoDs cooperating and liaising with teachers to maintain good and attainable teaching standards and practices (RSA, 2016). In addition, HoDs should form part of the performance appraisal process of teachers (RSA, 2016) to improve the quality of teaching and learning even more.

According to Du Plessis and Eberlein (2018), HoDs have formal responsibilities and accountabilities that they can wield vertically and horizontally, and they are responsible for collaborating with educators in developing their departments and staff in such a way that the vision and mission of the school are accomplished in the process. Basset (2016) also states that HoDs should horizontally and vertically exert their influence on aspects such as budgets, developing departmental vision and strategic planning. As such HoDs play a pivotal role in a school as they are central in the leadership hierarchy and can therefore mediate between staff and senior management (Basset, 2016).

Taking on the role of an HoD not only requires the attainment of a whole new skill set, it also demands an psychological and emotional re-adjustment (Leask & Terell, 2013), as managing and leading departments in public schools in South Africa is of the utmost importance to develop a workforce that is capable and skilled (Marishane, 2016). Therefore, not only should an HoD be alert to the learning needs of learners and teachers (Bush, 2009), but an HOD should also give guidance regarding subject methodology, syllabus planning, remedial work, the well-fare of learners and staff, practical work and general provision of leadership (Du Plessis & Eberlein, 2018). The role of HoDs in schools is increasingly being recognized as a powerful force that influences school effectiveness (Javadi, 2014) and supporting and successfully utilising HoDs within a department will enable them to develop local teaching and improve the learning culture (Mårtensson & Roxå, 2016).

2.6 CONTEXTS OF DIFFERENT DEPARTMENTS

When analysing the different roles of an HoD, one needs to consider the differences in role expectancies based on which phase or subject HoDs are appointed in. Roles will for obvious reasons differ from school to school based on numerous factors such as enrolment numbers and the need for an HoD within a certain department (Du Plessis, 2016). The context of HoDs in a primary school will differ vastly from the context of a secondary school. In secondary schools HoDs need to have extensive and specific subject knowledge. In schools where HoDs share subjects with members of their department, loyalty within a subject group can be vital for change and improvement (Du Plessis, 2016) and ultimately contribute to professional development of staff as well as improvement in teaching and learning.

The context of a primary school is such that HoDs may be appointed based on experience. In the foundation phase, the appointment of HoDs is solely based on experience and ability. In the intermediate phase subjects like Mathematics and Languages are individually grouped, whereas subjects like Social Sciences or Natural Sciences that are remotely similar can be grouped together (Du Plessis, 2016). It is however crucial to remember that all HoDs, irrespective of the context they work in, are in key positions in a school, and it is of the utmost importance to appoint them based on factors that include adequate subject and curriculum knowledge, excellent teaching abilities and a thorough understanding of classroom and assessment practices (NEEDU, 2012: 81).

2.7 COMPETENCIES EXPECTED OF AN EFFECTIVE HEAD OF DEPARTMENT

According to Potgieter, Basson and Coetzee (2011) there are certain skills that HoDs will need to acquire in order to be effective in their role. These new skills will enable them to be flexible in dealing with the complicated and diverse human nature of learners, teachers, stake holders and parents (Saul, 2019). In addition, HoDs need to be proficient in managing and guiding their department towards improvement (Du Plessis & Eberlein, 2018).

HoDs should be emotionally mature adults who display high emotional intelligence to execute their role successfully (Saul, 2019). HoDs not only should have competence to self-develop as leaders and managers, but should also have self-control, compassion, the capacity to motivate others (Saul, 2019) as well as self-confidence,

self-awareness, the ability to self-regulate, trustworthiness, commitment and optimism (Moorosi, 2014). According to Leithwood (2016) an HoD should also demonstrate skills such as dedication, have an energetic approach, be considerate towards others, be grounded as an individual whilst modelling good values to colleagues. According to Basset (2016) an HoD needs to develop skills in creating and maintaining interpersonal relationships as they form the core of middle management.

The position of an HoD requires from the incumbents an eagerness to learn and to develop themselves as well as their department (Marishane, 2016). The ideal HoD should possess cognitive abilities such as extensive pedagogical knowledge, the ability to identify short term goals, creating high performance expectations (Leithwood, 2016), high level skills in decision-making, excellent problem-solving skills and good communication skills whilst being a creative and critical thinker (Saul, 2019). These are all skills that will benefit HoDs when heading meetings and for gathering information from teachers that will allow them to translate curriculum objectives in such a way to make it practical in the classroom (Saul, 2019).

All HoDs should have the ability to instil a sense of collective ownership (Basset, 2016) in their departments. To reach this goal, there are a few social competencies an HoD should possess. HoDs should be able to crisis manage by having the courage to face unforeseen issues and challenges (Leask & Terell, 2013). HoDs are also people who have influence over others. They need to be resourceful and clear minded when it comes to applying suitable strategies and approaches in various situations (Ghavifekr, Hoon, Ling & Ching, 2014). HoDs should also act as proper leaders and managers by having the ability to pay attention to detail and to be well organised in their work, during meetings and planning (Leithwood, 2016). Another social aspect that HoDs should be able to perform is to create a healthy working environment by buffering their staff members from distractions and keeping them accountable (Leithwood, 2016). Lastly, HoDs should be able to stimulate personal and professional growth of themselves as well as that of the teachers in the department (Saul, 2019).

Acquiring and maintaining these skills will result in HoDs having the competence to perform their role as an HoD effectively (Potgieter, Basson & Coetzee, 2011) and

therefore create an environment that develops staff members who are responsible and committed (Marishane, 2016).

2.8 CHALLENGES OF THE HEAD OF DEPARTMENT

Clearly the role of the HoD is evolving and over time has become more complex with more and bigger responsibilities, a larger workload and higher performance expectations (Thorpe & Melnikova, 2014). Challenges that HoDs may be confronted with have been identified and are discussed below.

2.8.1 Lack of preparation for the position

According to Saul (2019) HoDs generally do not have sufficient and essential knowledge to be successful despite the importance of their role. They lack the required attitudes and skills or suitable managerial competencies to execute their roles effectively. Many HoDs feel that they have had insufficient professional and leadership development to prepare them for the role (Basset, 2016). Javadi (2014) states that the lack of leadership initiatives from schools is one of the shortfalls that constrain HoDs throughout their careers, as leadership and management competencies are skills expected from them from the moment they are appointed (Marishane, 2016).

In most circumstances HoDs are appointed due to their seniority and expertise as a teacher rather than for their aptitude for leadership and management (Javadi, 2014). Being in the position of an HoD does not necessarily entail that the individual fulfilling the position possesses the competencies and skills needed regarding leadership and management (Marishane, 2016). Basset (2016) reinforces these viewpoints by stating that most stakeholders assume HoDs are selected based on their leadership, but this has been proven over and over not to be the case. For apparent reasons, a brilliant teacher does not automatically equate to a good leader and manager of adults (Leask & Terell, 2013), resulting in many HoDs not being able to successfully manage the staff in their department (Saul, 2019).

The majority of HoDs feel that they acquired the skills and competencies required of the role through a process of trial and error, rather than through management and leadership development programmes (Basset, 2016). Some HoDs felt that what they know, they learnt while on the job and by observing others (Javadi, 2014). There are not many factors that contribute to the preparation for fulfilling the role of an HOD

other than developing certain abilities and acquiring skills through gaining experience after being appointed (Du Plessis, 2014).

The general lack of leadership and management preparation exacerbate the already complicated and challenging role of the HoD (Basset, 2016). In South Africa, the minimum requirement to be appointed as an HoD in a public school constitutes only of a minimum of three years teaching experience (RSA, 2016). However, with only three years of teaching experience one can still be classified as a novice teacher (Fantilli & McDougall, 2009). Novice teachers face as many challenges as newly appointed HoDs – the challenges differ, but they are nonetheless perceived as big obstacles and sometimes impossible circumstances. A big stress factor for novice teachers is the difference between what they envisioned teaching to be and the reality thereof (Tait, 2008). The same can be said for the transition from teacher to HoD. Stanulis and Floden (2009) are of the opinion that it takes a teacher three to seven years to meet the demands of a teacher. One can hardly expect a teacher in such a position to effectively fulfil the role of an HoD to manage and guide a whole department towards better educational outcomes or standards.

2.8.2 Role ambiguity

The constant change in the role of an HoD in a school has created numerous challenges (Basset, 2016), including the aspect of role ambiguity. Many HoDs can simply not perform their expected duties, because they do not understand their role and are not aware of all their responsibilities (Kosgei, 2015). Despite the fact that especially the leadership role (Mårtensson & Roxå, 2016) of the HoD is not clearly stipulated to newly appointed (and experienced) HoDs, there are also a variety of discrepancies between the anticipated competencies and the actual day to day practices of HoDs (Kosgei, 2015). Because the role of HoDs is not clearly defined (Kosgei, 2015) and the majority of HoDs lack clarity about their role (Javadi, 2014), the execution of their duties is influenced in a negative manner (Kosgei, 2015). The constant change in expectations from HoDs will also lead to them accepting responsibility for all issues that arise (Basset, 2016) without having the required competencies, which can be a very taxing task in a school environment.

2.8.3 Lack of time

Another aspect that burdens HoDs is the lack of time to do all that is expected of them, including activities such as reflecting on practices and experiences, observing lessons, doing planning related to teaching and departmental functioning (Javadi, 2014) and not enough non-contact time to execute these duties (Basset, 2016). The Personnel Administrative Measures (PAM) prescribe that an HoD should spend 85 – 90% of their time teaching classes (RSA, 2016), which leaves little time to execute their other responsibilities.

Basset (2016) also states that HoDs are overburdened with compliance tasks to such an extent that they dominate their time and they are left with a shortage of energy and time to fulfil their duties as both a classroom teacher and a subject and departmental leader. The effectiveness of HoD leadership depends on having enough time available in a day to execute both teaching and leadership duties simultaneously (Leithwood, 2016). A lack of time will surely obstruct the efficiency and success of an HoD (Javadi, 2014).

2.8.4 Workload

Because the role of an HoD has changed a lot in the previous decades, the workload of an HoD has become more challenging, because they are continually given new tasks and responsibilities, whilst simultaneously being expected to provide opportunities to develop and improve their departments (Basset, 2016). With HoDs being in charge and responsible for multiple aspects of their department (and their school) (Javadi, 2014), the demands on HoDs to continuously improve and raise standards are ever present (Thorpe & Melnikova, 2014). Change in education is unavoidable (Leask & Terell, 2013), which leads to the workload of an HoD constantly changing, making it even more complicated for an HoD to fully understand and execute the expectations of their role. Basset (2016) goes as far as to say that the workload of HoDs has expanded to such a degree that the increase in workload has moved way past what is manageable for one individual.

2.8.5 Complicated role

The 21st century expectations that are placed on HoDs are not only complicated, but also demanding and varied (Basset, 2016). Their roles demand from them to constantly face and manage changes within the curriculum, including changes

regarding instructional methods whilst keeping up with constant advances in technology, altering laws, regulations, policies and procedures, as well as the individual learning needs of learners (Marishane, 2016).

As discussed earlier, HoDs have the dual function of leader and manager (Basset, 2016) which can lead to an HoD becoming very isolated (Thorpe & Melnikova, 2014). HoDs do not necessarily form part of the senior management team, but they are also teachers and this fact puts them in the middle of the school hierarchy. They have an important role to fulfil, but do not completely fit in with either the teachers or upper management. The challenging part for HoDs is that they must defend and attend to their department's welfare and interests without damaging others (Leask & Terell, 2013) and still foster healthy relationships with colleagues. When making decisions, HoDs need to first consider the group dynamic as well as inter-relationships with for example other subject departments, by focusing on enhancing ownership within their team and to be able to empower staff members instead of controlling them (Leask & Terell, 2013).

The role of the HoD is thus subject to pressure from upper management as well as from the classroom below (Leask & Terell, 2013). Managing both downwards and upwards require different behaviours from an individual and can be challenging for an HoD, especially when newly appointed (Leask & Terell, 2013). Working with people, HoDs will also encounter challenges regarding the hopes and aspirations of staff members, the raw underlying emotions of all stakeholders involved in a school's system and moral dispositions (Saul, 2019). On top of the already heavy work burden, this multi-faceted role can be very demanding for an HoD.

2.8.6 Resistance from teachers

HoDs may be confronted by resistance from teachers within their department. A large percentage of teachers will not necessarily support an HoD by opposing them in tasks such as the supervision of teachers, classroom observation and the appointment of new departmental members (Leithwood, 2016). Some staff members prefer the principal to execute these tasks that are closely related to teaching (Leithwood, 2016).

Maintaining healthy human relations between staff members and HoDs will stay a major challenge throughout an HoD's career (Ghavifekr, Hoon, Ling & Ching, 2014).

Even though this can be very daunting and challenging (Mårtensson & Roxå, 2016), HoDs should not be discouraged to work with teachers (Marishane, 2016), as a well-functioning department can serve as a powerful centre of improvement of learner outcomes (Leithwood, 2016). According to Mårtensson and Roxå (2016) it is a challenge to get a group of academics to work together successfully and the resistance from teachers is one of the aspects of the role of an HoD that needs to be pro-actively managed.

2.9 THE IMPORTANCE OF LEADERSHIP DEVELOPMENT

The educational field is a very dynamic sector and if educational leaders are to effectively execute their duties, there must be continued development of their skills and abilities (Kosgei, 2015). Saul (2019) states that school leaders should continue to unlearn and learn which makes development and training essential. The new knowledge and skills educational leaders acquire through leadership development will positively influence the quality and quantity of their work (Kosgei, 2015).

It might be an impossible task to eliminate the challenges and obstacles HoDs face, but through leadership development programmes they can be better prepared for the job at hand (Basset, 2016). According to Eacott and Asuga (2014) leadership development is such an important factor that without it, any attempt to promote education is unlikely to succeed. According to the National Education Evaluation and Development Unit (NEEDU) the most important task of school leaders is to facilitate professional development in their schools (NEEDU, 2012) and what better way to do it than to actively engage HoDs who are in key positions within a school to deliver sustainable guidance and support (NEEDU, 2012: 78) to staff members in their departments.

Leadership development can be described as a complex social process that broadens the shared capability of staff members and enables them to work together effectively (Moorosi, 2014). Leadership development of educational leaders enables them to meet the expectations that leadership has to offer. This process benefits the organisation, the individual as well as society as a whole (Moorosi, 2014).

Education and the excellence thereof are precious commodities and with the pressure and expectations on educational leaders increasing daily, it is essential for them to be adequately trained and prepared. Educational leaders need to have

adequate knowledge regarding financial management, the general management of a school, instructional leadership skills to promote teaching and learning, as well as the ability to recognize and assume responsibility (Ghavifekr & Ibrahim, 2014).

If a school want their educational leaders to be able to execute their tasks successfully, there should be some level of investment in their leadership development (Saul, 2019). According to Basset (2016), HoDs should be offered the support and training needed to be able to fulfil their role as educational leaders. HoDs should be taught management and leadership skills to manage the teachers in their departments effectively and competently deal with changes made in the curriculum (Marishane, 2016).

These skills can be attained by relying on the fundamentals of Kolb`s Experiential Learning Theory. This theory states that by becoming a member of a specific society, it will allow an individual to learn by just being involved in the day to day tasks of an HoD (Kolb & Kolb, 2009). Prospective HoDs will thus obtain the skills they need to fulfil their role by hands on experience, which means that leadership functions should be distributed to them while still being a teacher. This will better prepare them for the challenges they may face after being appointed as an HoD.

Snoek (2014) is of the opinion that leadership development should strongly focus on curriculum leadership and to a lesser extent on administrative matters. Kolb`s Experiential Learning Theory also attests to this perspective, as one of its main goals is learning the specifics of a particular subject (Kolb & Kolb, 2009). It is of the utmost importance for HoDs to be up to date with the most recent curriculum developments (Du Plessis, 2014) and there is no better way to stay up to date by continuously learning through experience. Whether an aspiring or experienced HoD, reflection on their learning experiences regarding an aspect such as curriculum development combined with the experiences and challenges they face on a daily basis, will inevitably contribute to the reality of HoDs (Guthrie & Jones, 2012) and enhance their skill set and capabilities.

According to Marishane (2016) training of current and aspiring HoDs is crucial as it is a human capital investment and therefore increases competence regarding interpersonal skills which is necessary to execute the various organisational roles (Moorosi, 2014). Developing the leadership and managerial skills of HoDs will not

only result in life-long learning, personal and professional development, but also improve overall school performance (Marishane, 2016). Saul (2019) is of the belief that HoDs should continuously grow in their capabilities, knowledge and competencies by progressively concentrating on an ongoing leadership programme. These are skills that can be learnt through educational encounters or everyday life events (Guthrie & Jones, 2012) which are all underlying factors of Kolb's Experiential Learning Theory.

The leadership development of HoDs should include strategies such as mentoring and networking (Moorosi, 2014) as they help to create HoDs who are focused on their work and to analyse problems thoroughly before making decisions (Snoek, 2014). It is also important to support, develop and train skills and competencies that will enable them to manage the teachers in their departments. This can be achieved by taking part in group discussions, taking on individual learning projects, attending of conferences, completing problem solving activities and reading up on case studies (Saul, 2019). Leadership development for HoDs should also include enough exposure to policies and practices governed by selection training, procedure and performance appraisals/evaluation of staff (Saul, 2019).

Formal leadership training will improve their problem-solving skills and empower them to be accountable for their actions (Marishane, 2016). Formal and informal leadership in schools should be claimed and granted as it requires the development and internalisation by leaders and followers (Snoek, 2014). According to Zhang and Brundrett (2010) the attention in schools are turning away from formal leadership to real world leadership, focusing on the experience individuals can gain through involvement in the workplace. This is a clear indication that the fundamental principles of experiential learning will benefit aspiring HoDs to develop the skills required to effectively execute their duties and responsibilities.

Leadership development is not only confined to intentional or formal development (Evans, 2014). Informal initiatives can lead to important leadership attributes such as vision, openness and approachability being unintentionally developed (Moorosi, 2014). Training and preparation of HoDs can even occur as identity construction instead of gaining and fostering managerial skills (Moorosi, 2014). It is however important for all organisations to explore the potential and background of an HoD before organising any leadership or management training (Marishane, 2016) as the

level of skills and competencies will determine what specific training is needed based on what the trainee already possesses (Kosgei, 2015). Aspiring and current HoDs should embrace any initiative or training opportunity as it will ultimately make them indispensable to their employers (Marishane, 2016).

Leadership development does not only need to come from the school's side. Individuals can take leadership development into their own hands. Studying part time for a master's degree in education management and leadership for example will contribute to the development of leadership qualities and skills that lacked in their initial teacher education (Snoek, 2014). This will not only benefit the school, but it will ultimately benefit them more in the long run if they form part of the percentage of HoDs that aspire to become principals (Leithwood, 2016).

HoDs should be able to run the school when the principal is absent (Ghavifekr, Hoon, Ling & Ching, 2014). This makes leadership development an even more important aspect in schools as it can improve school performance (Marishane, 2016). Despite numerous attempts and initiatives involving leadership development programmes across the globe, there are still many countries in Africa that has no formal requirements for aspiring HoDs or any formal preparation or developmental initiatives available to HoDs (Eacott & Asuga, 2014). There should be a paradigm shift in order to raise awareness of the importance of creating learning and development opportunities for the educational leaders of our country (Day, Gu & Sammons, 2016). It has been proven that the more educated and empowered HoDs are, the better schools perform (Marishane, 2016), and this fact makes leadership development programmes essential and non-negotiable.

2.10 CHALLENGES IN THE IMPLEMENTATION OF LEADERSHIP DEVELOPMENT PROGRAMMES

Most schools want to ensure that teaching and learning are enhanced and therefore allow leaders to acquire leadership and management skills (Marishane, 2016). Yet there are numerous problems and challenges that arise in respect of the execution of leadership development in schools.

One of the challenges in the educational field is the fact that newly appointed managers often have very little direct leadership experience or any other form of formal preparation for the task at hand (Kalargyrou, Pescosolido & Kalargiros, 2012).

The lack of management and leadership training only contribute to their inexperience, making the job even more challenging. Basset (2016) states that the lack of experience and lack of preparation exacerbate a role that is already tough to manage. Being in a leadership position in a school does not automatically entail that one has the skills needed. This is not always realised by senior management, leading to HoDs lacking competence with regards to effectively managing their departments (Saul, 2019). Kalargyrou, Pescosolido and Kalargiros (2012) argued that some form of formal training should take place before entering any leadership role. The lack of preparation leads to managers entering their role without a clear understanding of the demands of their new role compared to their previous role as teachers. Research proved that the preparation of school leaders has a clear impact on their leadership practices (Zhang & Brundrett, 2010) and should thus be implemented in order to improve the overall leadership of a school. This is particularly applicable to the South African situation where the minimum requirement to be appointed as an HOD is a three or four year teaching qualification, registration with the South African Council of Educators (SACE) and three years teaching experience (RSA, 2016).

The National Education Evaluation and Development Unit (NEEDU) strongly pursues the implementation of competency tests for HoDs to determine whether an HoD has adequate knowledge regarding the curriculum as well as assessment standards and methods (NEEDU, 2012). Only when HoDs are adequately informed and equipped for being an HoD, can they contribute to the professional development of the staff members in their departments. This point has a lot of merit in the South African context, as the minimum requirement for an HoD is only three years of teaching experience (RSA, 2016) which according to literature still classifies such a teacher as a novice teacher (Fantilli & McDougall, 2009). This raises the question whether such a person is adequately prepared to run a department and manage the professional development of staff members. According to Fantilli and McDougall (2009) a novice teacher has three to five years' teaching experience and a general inability to manage time effectively. A novice teacher still needs time and experience to implement the knowledge, skills and abilities learnt at university in the practical context of teaching. An HoD with as little as three years of teaching experience will not necessarily have the skills required to enhance and improve and support the

professional development of staff members regarding aspects such as subject knowledge, classroom management skills, curriculum planning, moderation and various approaches of assessment, to name only a few areas where an HoD should be able to guide and support.

Another issue is that the majority of research on school leadership is mainly dominated by research focusing on the role of the principal (Naicker & Mestry, 2013). According to Bush (2008) several countries, such as Scotland, England, France, Canada and the USA have formal development programmes in place for aspiring and acting principals, but very few countries offer programmes for any other leadership and management positions in schools, therefore overlooking the need for leadership development and improvement of middle managers (Naicker & Mestry, 2013). The fact that the position of an HoD serves as a steppingstone to become a member of the senior management team is generally overlooked by most education authorities and they therefore do not invest in the leadership development of HoDs. According to Leithwood (2016), HoDs are an untapped source of leadership and it is thus important to optimise their influence by properly equipping them to manage their departments by investing in their leadership development.

Even though formal training has a certain role to fulfil, it is important to realise also that no training programme will prepare or develop effective leaders without contextual support from the school (Zhang & Brundrett, 2010). Activities such as mentoring, coaching and apprenticeship (Zhang & Brundrett, 2010) will contribute more to leadership development and help more with day-to-day tasks than any formal training programmes can, because they are context based. According to them, the most significant experience comes from on the job training rather than formal training. Most HoDs admit that it is through trial and error that they have learnt to do their job and not necessarily through the means of leadership development programmes (Basset, 2016). This evidence strongly supports the fact that no course-work or reading can prepare aspiring leaders for the rigours of professional activity and that even though training is helpful, hands on experience is what makes leaders who they are (Zhang & Brundrett, 2010). Bush and Jackson (2002) are also of opinion that there is already not enough time in a day to let the focus fall on formal training. This statement therefore supports the process of preparing HoDs through

Kolb's experiential learning methods that incorporate daily and hands on experiences as part of their training and development.

Another factor that contributes to the complexity of the implementation of leadership development programmes is the fact that leaders in an organisation come from different backgrounds and need different skills to be developed (Zhang & Brundrett, 2010). Educational leaders should be prepared and trained for the specific context (Marishane, 2016) of their roles and allow them to understand themselves as well as their roles within their specific context (Moorosi, 2014). Snoek (2014) also states that context is important by adding that leadership development programmes should address individual factors as well as situational factors such as organisational culture. Educational leaders will have diverse needs based on their leadership skills, knowledge, level of expertise and previous experiences (Marishane, 2016).

Two other major factors that have an influence on the successful implementation of leadership development are the lack of funds (Kosgei, 2015) and the lack of time (Leithwood, 2016). Similarly, Javadi (2014) asserts that a lack of training opportunities and a shortage of time negatively impact the efficacy of an educational leader.

The other side of this argument is summed up by Zhang and Brundrett (2010) who argue that if educational leaders want to become professionally competent, they need to take control of their own professional learning. Leadership development will improve an individual's leadership capabilities without having any connotation to an organisation (Moorosi, 2014). It will influence the individual, regardless of the school or context where they are employed. Because leadership development is life-long, continuous and contextual (Sullivan, 2013), it is important for educational leaders to realise that the responsibility of leadership development does not only lie with the government or external agencies (Zhang & Brundrett, 2010). It has been proven that taking part in formal leadership development programmes has a dramatic effect on the leadership practices of an individual (Snoek, 2014).

Unfortunately, in the South African context, where the minimum requirement for a HoD position is only three years teaching experience (RSA, 2016), it is not a prerequisite to pursue post graduate management and leadership degrees or any other form of formal managerial training before assuming the position of an HoD. This is a

cycle that keeps on repeating itself, as HoDs are generally appointed because they are respectable teachers or with the most experience (Javadi, 2014). Many who are appointed unfortunately has no experience with regards to managing and running a department. Any new position as a school leader requires a certain amount of keenness to develop and learn (Botha & Triegaardt, 2014) and further training or development should be encouraged rather than setting the minimum requirement for a position such as an HoD so low that in effect it doesn't motivate the HoD to pursue further professional development or to improve the quality of management and leadership skills in schools.

Bush (2009) also highlights the fact that is unclear how to implement and combine leadership development approaches to provide a holistic learning experience that will meet the needs of leaders at different career stages and different contexts. Bush and Jackson (2002) and Du Plessis and Eberlein (2018) are of the opinion that leadership development programmes in schools are often inadequate, uncoordinated and there is a lack of time to focus on professional development. These factors contribute to the enormity of the problem faced by educational leaders in terms of leadership development and succession planning. It is also important to realise that the process of improving leadership development programmes in South Africa is complex and a solution to the challenges we face cannot simply be borrowed or replicated from other countries with different contexts (Thorpe & Melnikova, 2014).

2.11 CONCLUDING REMARKS

It is clear that steady and stable leadership in a school is indispensable to a school's success (Marishane, 2016) and that the nurturing of leadership potential is crucial for the development of the South African education system in general, and the improvement of individual schools in particular (NEEDU, 2013). This is particularly applicable to HoDs who are important role players in the success of any school and they have a direct influence on learner outcomes as well as the quality of teaching and learning (Leithwood, 2016). With the education sector in need of strong leaders, HoDs are called to assume leadership responsibility (Javadi, 2014) and to undertake the support and guidance of the teachers in their departments (NEEDU, 2013).

Schools are in dire need of educational leaders that provide the best possible education for learners (Marishane, 2016). HoDs embody a large part of the leaders

of a school as they have various responsibilities to fulfil their dual function of being both leader and teacher (Marishane, 2016). It is therefore important that the significance of the role of an HoD should be universally and locally recognised in schools. HoDs should be actively prepared for the job at hand through the means of leadership development, because when leaders are involved to benefit teaching and learning, it will dramatically improve educational development (Mårtensson & Roxå, 2016). HoDs should thus assume the responsibilities delegated to them by the senior management at their schools (NEEDU, 2012) to ensure sustainable improvement.

In the next chapter I will focus on the research methodology and research design I employed in this study. In addition, I will discuss the sampling, data collection and data analysis strategies I have used and will explain how I ensured trustworthiness of the data and the credibility of my findings.

CHAPTER 3

RESEARCH METHODOLOGY

3.1 INTRODUCTION

In this chapter the research methodology and the research design of this study are discussed and substantiated. Attention will be given to multiple cases studies as this was the research design followed. Aspects regarding participant selection, semi-structured interviews as a data collection method and the data analysis are presented. Also included in this chapter is a discussion of the ethical considerations that needed to be addressed. The limitations of this study will be discussed in the last section of this chapter.

3.2 RESEARCH PARADIGM

The study was conducted from an interpretivist research paradigm. This research paradigm is based on the notion that the researcher discovers reality through the participants' viewpoint (Thanh & Thanh, 2015). Interpretivism also offers a perspective that enables one to analyse data that shed light on the way a certain individual or group experiences a specific situation (Maree, 2016). This study focused on the experiences of newly appointed HoDs, thus gaining a perspective on how these individuals perceive their daily experiences and challenges.

An interpretivist research paradigm relies on qualitative research methodology as it considers the subjective interpretations of individuals (Maree, 2016), accepting multiple viewpoints (Thanh & Thanh, 2015) from a variety of individuals. A qualitative research approach enables the researcher to obtain rich reports that will allow them to fully understand the context of the participants' experiences (Thanh & Thanh, 2015). Interpretivist research makes use of qualitative methods (Thanh & Thanh, 2015) such as case studies that are used in this study.

An interpretivist research paradigm not only allows the researcher to explore and explain a certain phenomenon through the eyes of different participants (Maree, 2016), but also to construct and interpret (Thanh & Thanh, 2015) understanding from gathered data. In this paradigm data are not discovered through rigid ways (Thanh &

Thanh, 2015), but rather through qualitative methods such as semi-structured interviews as used in this study. This method allows the researcher to study the participants in their natural and social contexts (Maree, 2016) which is one of the key principles of interpretivism.

3.3 A QUALITATIVE RESEARCH METHODOLOGY

This study engaged with the participants in the environment where they currently are employed. Qualitative research aims to comprehend individuals' lives as they are experienced and lived (Doody & Noonan, 2013) from their perspective and is carried out in their naturalistic setting (Thanh & Thanh, 2015). This approach makes it possible to observe how the participants make sense of their surroundings through social structures and perform their social roles in schools where they are currently employed (Maree, 2016). A qualitative research approach significantly improves the researcher's understanding of complex interactions between the participant and their environment (Anderson, Leahy, DelValle, Sherman & Tansey, 2014) which makes it ideal to gather data from recently appointed HoDs.

According to Maree (2016) qualitative research uses research questions that are of an exploratory nature. The research questions and sub-questions of this study aimed to explore and investigate a certain phenomenon by asking questions such as how recently appointed HoDs experienced their preparation to become HoDs and by asking what systems are/were in place to prepare them for the job at hand. These questions were not to determine a certain outcome, but rather to understand and extract meaning from data (Maree, 2016). Anderson *et al.* (2014) state that qualitative research provides one with an opportunity to come to an understanding of a multi-dimensional and complex phenomenon as indicated in the research questions of this study.

Qualitative research follows a non-linear path (Choy, 2014) enabling the researcher to explore factors such as context, process and meaning through inductive reasoning (Yilmaz, 2013). This contributes to the researcher having in-depth knowledge and background when attempting to interpret the responses the research questions set out in this study.

One of the characteristics of qualitative research is that participants are selected through non-random methods (Thanh and Thanh, 2015) such as purposive sampling.

This will contribute to the data collected not to be generalized as the participants will represent a specific group that has been narrowed down to enhance the quality and richness of the data. In this study the participants were all selected based on predetermined requirements that will be discussed in this chapter. This method of sampling also allows the researcher to view diverse groups of people and to see a variety of experiences within a certain context (Choy, 2014).

However, when making use of a qualitative research approach the researcher's interpretations can be limited (Choy, 2014) which can easily lead to some underlying issues being missed or overlooked. Because the researcher asks broad (Thanh & Thanh, 2015) and open ended (Choy, 2014) questions, this can easily lead to the researcher's personal experiences and prior knowledge to influence their observations and conclusions strongly and lead to subjectivity when interpreting findings. A fine balance must be struck between open-minded inquiry (Choy, 2014) and understanding the world as experienced by the participant, without predetermining their standpoint (Yilmaz, 2013).

3.4 RESEARCH DESIGN

The research design used to conduct this research is a multiple case study design. By making use of a qualitative research design, this study aims to seek answers to questions in the participants' natural setting (Maree, 2016) by using the members of that setting to gather information.

A multiple cases study, which is also called a collective case study, is based on the same principles of a singular case study, the only difference being that the main goal of using a multiple case study is to replicate findings across all participating schools (Maree, 2016). According to Maree (2016), a multiple case study would allow researchers to explore and analyse the differences within and between all settings used to conduct research.

The multiple case study design allowed me to interview several recently appointed HoDs from different schools and backgrounds - which led to a wide variety of data on the same phenomenon. Multiple case studies are also in-depth studies that focus on a specific phenomenon within a specific context (Vohra, 2014). This study focused on the development and experiential learning of recently appointed HoDs in public schools. Case studies are selective (Noor, 2008), focusing on one or two

issues that are essential to understanding the phenomena within the context that is being studied (Vohra, 2014). In this study the focus was narrowed down, only focusing on the development and experiential learning of HoDs within a certain context, i.e. public schools.

The topic of this study is *Leadership development of heads of department in public primary schools*; thus, already implying that different settings will be compared. Multiple case studies investigate a group of cases (Tellis, 1997) which align well with the title of this study. The perspectives of the various participants in this study will be compared which also will contribute to an in-depth study (Maree, 2016). A qualitative research approach, like a multiple case design, uses and involves participants in the data collection process to better understand a situation. The researcher should be able to interpret what they hear and see in order to gain a clear picture of the complex issues (Anderson *et al.*, 2014) HoDs face in their leadership development.

It has previously been established that leadership in schools affects learner outcomes (Bush & Jackson, 2002) thus leading to the conclusion that the development of potential school leaders, like newly appointed HoDs, is of the utmost importance. By making use of a multiple case study design, research was conducted at various schools with several individuals that represented the situation in Pretoria by understanding a small number of cases in order to understand real world cases (Maree, 2016).

3.4.1 Rationale for a multiple case study design

A multiple case study is the ideal research design to use for understanding a small number of cases to understand real world cases (Maree, 2016). By studying different cases, a general and broader perspective can be formed regarding the developmental and experiential learning among aspiring and newly appointed HoDs within public schools. Because data are collected independently from each participant (Anderson *et al.*, 2014), a multiple case study design allows the researcher to explore the similarities and differences within and between all cases (Baxter & Jack, 2008).

A multiple case study design can be linked with the theoretical framework of this study, i.e. Kolb's experiential learning, as a multiple case study focuses on a phenomenon in its natural context and from the perspective of the participants

involved in the phenomenon (Vohra, 2014). The focus will be on the experiences of the various participants as a multiple case study is a descriptive analysis of different individuals (Anderson *et al.*, 2014). According to Baxter and Jack (2008), one of the main goals of a multiple case study is to replicate findings across all cases which make it ideal for this study. Anderson *et al.* (2014) support this point by asserting that multiple case studies permit replication in the data collection process across all sites which help to clarify and understand the issue that is being studied.

Case studies are used when a holistic investigation is required (Tellis, 1997). It is important to note that when a study requires more than one case, a multiple case study is required (Baxter & Jack, 2008). By studying the development and experiential learning of recently appointed HoDs in public primary schools, the whole system be studied. The context of all cases are different which make the data collected from the participants more robust and reliable (Baxter & Jack, 2008). The background and frame of reference of each participant will also be illuminated, which means that this will be conducted in a holistic manner. One of the characteristics of multiple case studies is that they adapt to real life events (Zainal, 2007) which in this study will be the experiences and perceptions of recently appointed HoDs.

It has been noted that many HoDs do not have the necessary skills and competencies in order fulfil their duties (Potgieter, Basson & Coetzee, 2011). By using a multiple case study, the preparation and development of newly appointed HoDs can be explored by comparing the experiences of participants from different backgrounds to understand the dilemma better. Research within and across a variety of settings will allow the replication to indicate numerous aspects of the same phenomenon (Anderson *et al.*, 2014). By replicating the case through pattern matching, a multiple case study design enriches and reinforces the data collected from the previous result, which makes this method all the more effective (Zainal, 2007).

3.4.2 Disadvantages of a multiple case study design

There are advantages and strengths in a particular research design that makes that design the most suitable and ideal design for a research study. However, any research design also has disadvantages that should be kept in mind when undertaking research using that specific design.

According to Baxter and Jack (2008), a multiple case study design will allow the researcher to draw comparisons between cases and it can easily lead to the researcher being biased and having a direct effect on the conclusions and outcomes (Zainal, 2007) drawn from the study. Another disadvantage when using a multiple case study design is if the process of deciding which cases to take on for a research project is not conducted properly. Using case studies allow the researcher to expect similar results across all cases, which will allow for contradictions and similarities to be drawn (Baxter & Jack, 2008). It is therefore of the utmost importance to only take on cases that will allow a true reflection of the data as well as a wide-ranging variety of participants that will produce an equally broad range of data. Zainal (2007) states that a multiple case study does not give the researcher a lot of data for substantial scientific assumptions as only few participants, who are also limited to a certain geographical area, are used to gather data.

A multiple case study design requires extensive and vast resources as it is an expensive method of doing research, as well as being immensely time consuming (Baxter & Jack, 2008, Anderson *et al.*, 2014). The data collection process should be approached systematically and data should be recorded accurately and thoroughly (Baxter & Jack, 2008) which take up a considerable amount of time.

However, these disadvantages should not deter a researcher from choosing a multiple case study design. It should rather be kept in mind and managed properly when undertaking research that makes use of a multiple case study design.

3.5 SAMPLING

As case study methods favor the collection of data in the natural setting (Maree, 2016), data were collected from participants at the schools where they are currently employed. This study made use of purposive, homogenous sampling which entailed purposefully choosing participants according to set criteria and who can give a detailed description of a certain experience (Maree, 2016). Eight participants were chosen according to the criteria of having been appointed as an HoD at a public school in Pretoria within the last four years. These participants could give fresh and valuable data regarding their training, experiences as well preparation processes before becoming HoDs. This study was not limited to some schools, but it focused on the number of participants that met the criteria set out above. The profiles of all

the participants are indicated in Table 3.1 below:

	Gender	Years' experience as a teacher	Years' experience as an HOD	Department of expertise	School
Participant 1	Male	6	1	HoD – Social Sciences and Art	Primary school
Participant 2	Female	21	3	HoD – Foundation phase	Primary school
Participant 3	Female	12	1	HoD – Foundation phase	Primary school
Participant 4	Female	15	4	HoD – Foundation phase	Primary school
Participant 5	Male	11	1	HoD – Grade 7	Primary school
Participant 6	Male	12	2	HoD – Mathematics, Science and Technology	Primary school
Participant 7	Female	14	1	HOD - Languages	Primary school
Participant 8	Female	12	1	HOD - IT	Primary school

Table 3.1: Profiles of the participants

3.6 GAINING ACCESS TO PARTICIPANTS

Before starting this research, permission was obtained from the Gauteng Department of Education (GDE) to conduct research in public primary schools in Pretoria (Addendum A). E-mail addresses of principals or where applicable administrative personnel were obtained from numerous school websites. Administrative personnel were asked to forward my request to the principal, as not all websites listed the e-mail address of the principal. Letters that explained the purpose of my study were sent to the principals via e-mail. I enquired whether there are HoDs in that school that fell within the criteria set out by this study and whether they will be willing to give these potential participants permission to participate in this study (Addendum B). Where applicable, contact details of these potential participants were sent to me. All potential participants were then contacted via an e-mail and they were informed about the purpose of the study. Ethical considerations and the necessary consent forms were explained to them. The outline of the interview schedule was also sent to them. Appointments for interviews via Zoom were then scheduled in a time slot convenient to them.

It was challenging finding the required number of willing participants that met the criteria of this study. This could possibly be attributed to the uncertainties caused by the COVID-19 pandemic. This resulted in the interviews being conducted over a period of two months.

3.7 DATA COLLECTION STRATEGIES AND INSTRUMENTS

According to Noor (2008), case studies are designed to bring out the details from the viewpoint of the participant by using multiple sources of data such as observations, interviews and documents (Maree, 2016). This study made use of semi-structured interviews and textual data pertaining to official policy documents to collect data.

3.7.1 Semi-structured interviews

This study made use of semi-structured interviews as the main source of data. Interviews produce accounts of the participants' experiences that are extremely relative and entail a comprehensive perspective and interpretation of the participants' experiences (Doody & Noonan, 2013).

According to Noor (2008) an interview should be targeted and focused on the

specific topic that is being investigated and should be insightful in relation to the aim of the research. Semi-structured interviews make use of predetermined questions that allow the researcher to ask additional questions if the information provided by the participant warrant further inquiry. This enables the researcher to clarify (Doody & Noonan, 2013) statements made by the participant as well as to deviate from the original interview schedule in order to focus on a topic that arises by coincidence or when a participant responds to relevant details mentioned (Gill, Stewart, Treasure & Chadwick, 2008) throughout the interview.

Questions asked during interviews should be well formulated for interviews to be executed successfully and require thorough and proper planning (Doody & Noonan, 2013). According to Tellis (1997) a researcher should have the ability to ask good questions and interpret valid responses. The key questions used in a semi-structured interview should be worded in such a way that it will automatically shed light on the areas being investigated (Gill *et al.*, 2008) and encourage in-depth investigation that will spontaneously contribute to new concepts emerging (Doody & Noonan, 2013). Therefore researchers should listen attentively and be adaptive and flexible (Doody & Noonan, 2013) in their approach which naturally enforces elaboration on certain information that is important to the participant but have not been thought of by the researcher (Gill *et al.*, 2008). It is thus important that the researcher has a firm grasp and clear understanding of the issues being studied as this will allow trustworthy data which are unbiased (Noor, 2008). Tellis (1997) reinforces this perspective by emphasizing the fact that an interview should be targeted and focused on the specific topic that is being investigated and should be insightful. Questions should be well formulated and gather a complete recollection of answers given in the interview. For this reason semi-structured interviews reinforce the usage of open ended questions and permit matters regarding the research topic that arise naturally (Doody & Noonan, 2013).

As the collaboration between the researcher and the participant will enable participants to share stories openly with the researcher (Maree, 2016), the interviewer should possess the necessary skills to conduct a good interview. According to Noor (2008) a researcher should have the ability to ask good questions and interpret a valid response as interviews are very valuable in order to uncover the experiences and the story behind a participants' encounters (Doody &

Noonan, 2013). Semi-structured interviews warrant a certain amount of flexibility which enables the researcher to vary interview questions and pursue further questioning if needed.

One negative factor of semi-structured interviews that should be managed is that a researcher needs to possess the ability to know when and how to deviate from the script or how to prompt or probe a participant on a response (Doody & Noonan, 2013) given that warrants further questioning. Failing to do so can easily allow important data never to come to light and incomplete recollections given during the interview.

To adhere to the safety protocols relating to the COVID-19 pandemic, interviews were conducted via Zoom. All interviews were audio and video recorded. This was done with the participants' consent and transcribed afterwards. Copies of the transcribed interviews were sent to the participants to validate the interview transcriptions. Interviews were conducted in English. However, there were some of the participants that felt more comfortable to express themselves in Afrikaans when answering certain questions. These sections of the interview were translated into English for data analysis purposes.

3.7.2 Interview protocol

Before the interview took place, the participants were aware of the purpose of this study as well as what their role as participant entailed. The first step of the interview protocol included briefly restating the purpose of this research study, the research questions that will be addressed through the data obtained, the length of the interview as well the assurance that all ethical considerations are in place to protect their anonymity and confidentiality (Gill *et al.*, 2008).

Secondly, the following biographical information about the participants and their schools were obtained:

- the quintile in which their school falls.
- the school's geographical location.
- the number of learners enrolled.
- the number of staff members employed at their school.
- the number of HoDs in their department as well as their job

description/title.

- the participants' years of experience in education.
- their years of experience as a head of department.
- the number of years they have been employed at their current school.

The final section of the interview consisted of the following topics being discussed and elaborated on whilst maintaining a conversational tone (Doody & Noonan, 2013):

- The biggest challenges they faced as newly appointed HoDs and what skills are needed to successfully conduct your job as an HoD. This also led to the participants sharing their perspective on what preparation aspiring HoDs need to undergo to be successful and efficient as HoDs. During these discussions, their curriculum workload as well as allocated time for HoD-related responsibilities were elaborated on.
- The challenges they faced when first assuming the position of an HoD as well as what they have learnt through their own experiences that make them efficient HoDs were elaborated on. Any experiences they gained as a Post Level 1 teacher, that incidentally prepared them to meet the expectations set out for HoDs came to light. Intentional training, courses attended and experiences they had undergone before assuming the position as HoD as well as the effectiveness thereof were also discussed.
- The jump from being a teacher to an HoD was examined which led to discussions on whether there are ways to prepare someone for their new role effectively. Discussions on regulations given by the GDE regarding the role and requirements of an HoD were also briefly discussed in the interviews.
- Lastly, the interviewer enquired about who played the most significant role in the participants' leadership and management development as an HoD.

When conducting these interviews the word order and wording of these topics varied and the answers of some of the participants led to additional probing questions as this is permitted and fundamental to semi-structured interviews (Doody & Noonan, 2013). The interview protocol is included as Addendum C.

3.7.3 Document analysis

This study also includes secondary data in the form of the Personnel Administrative Measure (PAM) (RSA, 2016) containing core duties and responsibilities of an HoD. According to Tellis (1997) documents are a good source of data because it is unobtrusive, stable and covers a broad range of aspects. On the other hand, documents can be difficult to retrieve, or access might even be blocked due to the sensitivity of the information. The researcher can be biased in his/her choice of documents by only selecting documentation that proved his/her point. The document can also reflect author bias and might not always be objectively written (Tellis, 1997).

3.8 DATA ANALYSIS PROCEDURES

Although the data of a multiple case study can provide greater value in terms of findings, it is more difficult to implement than a single case study design (Maree, 2016). Keeping this statement of Maree (2016) in mind, the data analysis procedures should be done very thoroughly by using all data collected from the multiple cases which entailed independently collecting data from participants (Anderson *et al.*, 2014).

Case studies rely on analytical generalisations (Vohra, 2014). The analysis of the data should therefore focus on the differences and similarities of the experiences of recently appointed HoDs. I firstly had to transcribe the interviews. Some of the interviews were also translated and transcribed. The second step involved coding the collected data. This was done by reading and re-reading all the data and marking important segments. The process of coding allowed me to quickly retrieve data (Maree, 2016) during the rest of the data analysis process. As the goal of multiple case studies is to explore the differences and similarities across a variety of cases (Baxter & Jack, 2008), the third step was to analyse and tabulate the differences and similarities of the experiences of the participants. Recurring themes, topics and trends in the interviews conducted were identified, grouped and analysed. Themes that arose in the data regarding the phenomenon being studied were identified and analysed which contributed to the robustness and representativeness of the study (Anderson *et al.*, 2014) as it represented numerous sources of evidence (Zainal, 2007). Lastly, the conclusion of this research report was formulated to answer all the research questions as set out in Chapter 1.

Documents obtained from the Gauteng Department of Education (GDE) pertaining to public schools and the roles and requirements of HoDs were analysed and information applicable to this study were identified. The Personnel Administrative Measures (PAM) (RSA, 2016) was used to critically analyse the prescribed job descriptions and core responsibilities and duties of HoDs in public schools. Information obtained from the PAM document were categorized and juxtaposed against the themes and topics identified in the interview data. The interviews that were conducted were read and analysed over and over again not to miss any detail (Gill *et al.*, 2008) that could be used for categorisation as mentioned above.

Reports from the National Education Evaluation and Development Unit (NEEDU) were also used to examine the competencies expected of an HoD as well as the minimum requirements to fill this position (NEEDU, 2012; 2013). The data obtained from these documents were categorised and compared with the data collected from the interviews.

3.9 ETHICAL CONSIDERATIONS

After obtaining permission from the Gauteng Department of Education, an application for ethical clearance from the Ethics Committee of the Faculty of Education at the University of Pretoria was also approved. Principals were asked if they have HoDs that meet the criteria of this study and whether they would allow their staff members to partake in this research project (Addendum D). The principals were then also asked to provide a list of potential candidates. Various aspects regarding ethical considerations, including anonymity and confidentiality, as well as the fact that the data obtained were solely for research and academic purposes were also brought to their attention.

The candidates were contacted separately and asked if they were willing to partake in this study. The same ethical considerations regarding confidentiality and anonymity were guaranteed in the letter seeking their consent and the document explaining the aim of the study. The necessary documents explaining the aim of this study as well consent letters were sent to and signed by all parties involved which granted me contact with the participants.

The participants were ensured that the data obtained will be used for research purposes only and that their anonymity will be guaranteed by making use of

pseudonyms and a numbering system when data is analysed. The participants were also guaranteed that their identities will not be made known to the management of their schools, nor will any information obtained be divulged to the principal. It was also emphasised that participation in this research study would be voluntary and participants could withdraw at any stage. Transcripts of the interviews were also sent to participants to verify data.

3.10 TRUSTWORTHINESS AND CREDIBILITY

According to Maree (2016) the trustworthiness of data collected in a qualitative research design is of the utmost importance and certain measures need to be considered to ensure the data are trustworthy. When conducting qualitative research where there is neither absolute truth nor only one reality, but rather a reality that consists out of various interconnected aspects (Anney, 2014), the researcher should pay careful attention to aspects that enhance the trustworthiness and credibility of the study. There are four aspects that play an important role in the trustworthiness of the data collected namely, credibility, transferability, dependability and confirmability (Maree, 2016).

Credibility can be attained in various ways to ensure that the study measures the actual purpose (Shenton, 2004) of the research project in question. To improve the credibility of this study, it was ensured that the research design and methods, as well as the theoretical framework, were well aligned with the data (Maree, 2016). When engaging with the participants, it was done in such a way that they were set at ease during the interview to create a certain sense of familiarity (Maree, 2016). It was also important to gain familiarity with the culture of the participants' background and organisation, (Shenton, 2004) which allowed the researcher to have a better frame of reference when conducting interviews. Participants were also encouraged to be honest and frank and to give data readily (Shenton, 2004) which occurred naturally after establishing a sense of familiarity during the interviews. In this multiple case study, data triangulation was used to satisfy the ethical need to confirm the validity of the processes followed. Triangulation was done by making use of multiple sources of data (Noor, 2008) as well as different participants (Anney, 2014), which enhanced the quality of the data. Triangulation reduces bias of the researcher by examining the integrity of the responses the participants give (Anney, 2014). Frequent debriefing sessions with my supervisor

(Shenton, 2004) also helped to gain perspective with regards to the research and added to the credibility of this study.

Transferability is the extent to which the results of a particular study can be applied to other similar cases (Shenton, 2014) or be transferred to different contexts with other participants (Anney, 2014) still harboring similar outcomes. To improve the transferability of this study, it was ensured that the participants represented the entire population of the phenomenon being studied to clearly portray the context and phenomenon of this study (Maree, 2016). By making use of purposeful sampling in this multiple case study and by only selecting HoDs that have been in that position for four years or less, refined data was ensured. Purposive sampling helped me to focus only on certain key participants and that contributed to the transferability of data as well as in-depth findings (Anney, 2014). I also described the context in as much detail as possible in order to provide thick descriptions (Anney, 2014) for any reader of this study to make their own connections between the elements of the study (Maree, 2016). Thick descriptions will allow readers to draw their own conclusions (Shenton, 2004) with regards to the phenomenon studied. Thick descriptions entail all the research processes from the data collection process to authentic context as well as the final report of this study (Anney, 2014). Making use of detailed descriptions throughout the study not only allow other researchers to replicate this study (Anney, 2014), but also allow the reader to have enough context and information to draw their own conclusions and not only those set out by the researcher.

According to Maree (2016), dependability can be shown through the research design and the implementation thereof as well as the consistency of findings over time (Anney, 2014). The data analysis of this study was done in such a manner that any reader can easily follow and evaluate the interpretation, recommendations, (Anney, 2014) conclusion and findings. An audit trail was used to logically account for all changes or deviations made throughout the research to be comprehended by an objective reader (Shenton, 2004).

Confirmability can be described as the degree to which the findings of a study are formed by the participants (Maree, 2016) and the extent to which this study can be repeated (Shenton, 2004) and confirmed by other researchers (Anney, 2014). The findings should not be shaped by researcher bias, motivation or interest and should

instead be the actual accounts and experiences of the participants and not my ideas or preferences (Shenton, 2004). To minimize researcher bias and improve confirmability, triangulation and audit trails were used to ensure that there are visible evidence of the processes and my findings (Anney, 2014). Lastly, in order to improve all of the aspects regarding trustworthiness mentioned above, I made use of member checking; allowing participants to read the transcribed interviews to give the participants the opportunity to verify that what was transcribed is what was meant in the interview (Anney, 2014).

3.11 CONCLUDING REMARKS

This chapter outlined the research methodology followed throughout this study. Strengths and weaknesses pertaining to the research approach, the research design, as well as the data collection methods were discussed. All the procedures pertaining to data collection and analysis were also discussed. The ethical considerations pertaining to this study were also presented. In the next chapter I will present the data and discuss findings.

CHAPTER 4

PRESENTATION OF DATA AND DISCUSSION OF FINDINGS

4.1 Introduction

In this chapter the data captured in the study is presented. A brief biographical overview of each participant is given as well as a thorough discussion of themes identified during the data analysis. The interviews consisted out of fourteen questions. The following central themes that represent the experiences and perceptions of the HoDs were identified:

- Learning opportunities for HoDs.
- Experiences and perceptions of learning opportunities
- Challenges experienced newly appointed HoDs
- Skills required to be an HoD
- Expectancies of HoDs
- Structures in place for developing HoDs

The data pertaining to each of the themes are presented and discussed according to the responses of each of the HoDs. A summary of the profiles of the HoDs are provided in Table 4.1.

	Gender	Years experience as a teacher	Years experience as an HoD	Department of expertise	School
HoD 1	Male	6	1	HoD: Social Sciences and Art	Primary school
HoD 2	Female	21	3	HoD: Foundation phase	Primary school
HoD 3	Female	12	1	HoD: Foundation phase	Primary school
HoD 4	Female	15	4	HoD: Foundation phase	Primary school
HoD 5	Male	11	1	HoD: Grade 7	Primary school
HoD 6	Male	12	2	HoD: Mathematics, Science and Technology	Primary school
HoD 7	Female	14	1	HOD: Languages	Primary school
HoD 8	Female	12	1	HOD: IT	Primary school

Table 4.1 – A summary of the participants' profiles

4.2 HOD 1 – HOD: GR 4 – 7 SOCIAL SCIENCES AND ARTS

- **Biographical background and information**

HoD 1 has seven years teaching experience, of which six years was as a Post Level 1 Social Sciences teacher. He taught one year abroad before accepting a teaching position in South Africa. He has one year experience as an HoD and was appointed at the school where he worked previously as a Post Level 1 teacher. He works at a primary school that is situated in the Tshwane North district. He is one of seven HoDs at a school that has about 1 300 learners. He is HoD of the Social Sciences and Arts department of Gr. 4 – 7.

- **Learning opportunities for HoDs.**

HoD 1 had a mentor appointed to him whilst he was still a teacher and she “*guided him through the process*” when he was a subject head. His mentor also assigned him tasks to prepare him for more responsibility. He took charge of his own formal training and enrolled for courses in his own time, and at his own discretion and cost. The years he spent as a Post Level 1 teacher taught him how to maintain classroom discipline which evolved into self-discipline over time.

The HoDs at the school where he is currently employed are sent to any workshop that will help them towards preparation for a deputy principal or principal position. They are also given “*some deputy principal responsibilities*” to prepare them for the next level of management. These tasks are very informal and a “*day-to-day*” type of training.

- **Experiences and perceptions of learning opportunities**

He believes that his mentor allowed him to gradually “*get the hang of things*” prior to his appointment as an HoD and “*guided him to be a better HoD*” and to understand the school processes and procedures better. The formal learning he undertook on his own helped him prepare for aspects such as curriculum development and especially on how to “*get the curriculum across to your teachers effectively*”. He also attends district meetings. However, he is of the opinion that it was a waste of his time and that the content of those sessions could have been “*said in an e-mail*”. He indicated that the formal courses he attended as an HoD contributed to his skillset

and prepared him for a future deputy principal role in that it *“helps (him) with the development ahead”*.

He considers informal and formal training as equally important. He feels that tertiary education is essential for an HoD, but that one should not underestimate the *“knowledge you attain from day to day processes”* because ultimately they prepare you for your role and it is *“essential to develop any person as a whole”*.

- **Challenges experienced by newly appointed HoDs**

According to HoD 1 is it difficult to gain respect from senior staff members if you are promoted ahead of them. He also explains that it is extremely challenging to get some of the older and more senior teachers to move away from a paper-based system and to use online systems or any form of new technology. He said that it was *“a huge obstacle to overcome”* to use new technology in the classroom. Some teachers are textbook orientated, and it makes it difficult in the current educational system, as without technology, *“CAPS [the curriculum – own insertion] isn’t implemented as intended.”*

- **Skills required to be an HoD**

According to HoD 1, good communication skills are one of the best tools for a HoD because if there is no communication between you, your peer group and the members of your department, *“you will struggle to get ahead of your department”*. He also identifies organisational skills as being essential to create a daily routine that allows you to complete all your administrative work. Feeling strongly about the use of technology in the classroom, he is of the opinion that an HoD also needs be adequately equipped with regards to the latest technological advances in teaching. Another competency that, according to him, all HoDs need to master, is the ability to manage one’s own time.

- **Expectancies of HoDs**

HoD 1 feels strongly that all HoDs should look broader than the third world schooling system, but rather should be expected to work towards a first world system by implementing technological advances. He argues that the demands on an HoD are extremely high and that everybody *“thinks it is an easy job”*. According to him being

an HoD has a variety of components that lead to a wide variety of expectations within and outside of the classroom.

- **Structures in place for developing HoDs**

HoD 1 has implemented a mentorship program at the school where he is currently employed using many of his “*up and coming teachers who are well-equipped*” to give training to others on teaching related matters such as technology in the classroom. This, he believes, serves as good preparation for being an HoD.

4.3 HOD 2 – HOD: FOUNDATION PHASE

- **Biographical background and information**

HoD 2 has been employed as an HoD for three years. She has 21 years of experience as a teacher of which 18 was as a Post Level 1 foundation phase Gr. 1 teacher. She has been working at her current school for three years and she is the only HoD in her phase. The school is situated in the Tshwane West district and employs 32 teachers and has 800 enrolled learners.

- **Learning opportunities for HoDs**

HoD 2 attended an induction course for HoDs presented by the Gauteng Department of Education. She also attended a few other courses that she enrolled for by choice and on her own initiative. At the school where she worked before she unofficially assumed the position as an HoD. She was also a member of the school governing body, a curriculum leader and a grade leader. All these extra roles and additional responsibilities prepared her informally to be an HoD. She tries to attend any meeting or training course that will prepare her for the leadership role of a deputy principal. HoD 2 also had numerous mentors throughout her career.

- **Experiences and perceptions of learning opportunities**

HoD 2 is of the opinion that all the mentors that were appointed to her throughout her teaching career has had a significant influence on her with regards to her development as an HoD: This she articulated as follows:

Dit was verskillende influences; dit was nie net 'n spesifieke persoon of spesifieke insident gewees nie. (It was different influences; it was not just one specific person or a specific incident).

She believes that the induction course for HoDs was very insightful and allowed her to reflect on numerous aspects of her role as HoD. She also believes that her experience as a Post Level 1 teacher at a school with high academic standards, taught her a lot about time management, how to handle pressure and how to work with difficult parents. All the HoDs at the school where she is currently employed has some of the deputy principals' responsibilities. This, she explains, "*also helps with the development ahead to have some responsibility*".

- **Challenges experienced by newly appointed HoDs**

The hardest thing for HoD 2 as newly appointed HOD was to get all staff members "*to be a member of the team*" and "*om in te koop in dit wat jy droom vir die skool*" (to buy into what you dream for the school). She also states that it is hard coming in as an outsider because then you must prove yourself to everybody. To get the staff to move in the same direction with regards to the academic vision for her department was extremely challenging for her. She also stated that one of the biggest challenges newly appointed HoDs are confronted with is to maintain a balance between being task driven and being people orientated. Another challenge she mentioned is that the role of an HoD differs from school to school and each school has different expectancies – so you need to be able to adapt to a completely new setup when you change schools. Lastly, she mentioned that HoDs are frequently abused with regards to workload and responsibilities and too much is expected of them.

- **Skills required to be an HoD**

HoD 2 stated that to be effective as an HoD one should have good organisational skills, people skills and the ability to always be professional. She indicated that proper time management is crucial. She believes that one cannot have a "*silo mentaliteit*" (silo mentality) and that you need to work together – this however demands a certain level of people skills and a willingness to share ideas within your department. She also emphasises the importance of being fully equipped, well informed and knowledgeable regarding all issues relating to the curriculum.

- **Expectancies of HoDs**

HoD 2 stated that other than the responsibilities summarised in the Personnel Administrative Measures (PAM) “*moet jy maar doen wat jou hoof vir jou sê*” (you must do what your principal tells you to do).

- **Structures in place for developing HoDs**

HoD 2 strongly believes that the staff members in her department should be held accountable for their work. She uses her grade leaders to take responsibility of certain facets of the department and provides CAPS training opportunities to those who need or want it. In terms of her own development the school management team frequently allows her to attend principal or deputy principal meetings which give her exposure to what is required from senior school management. She also has some responsibilities that are generally associated with a deputy principal which provides useful preparation for a possible deputy principalship. She states that these opportunities and extra responsibility “*helps with the development ahead*”.

4.4 HOD 3 – HOD: FOUNDATION PHASE

- **Biographical background and information**

HoD 3 is one of two HoDs in the foundation phase at her school which is in the Tshwane North district. She has been an HoD for one year. She was a Post Level 1 teacher for eleven years which gives her a total of twelve years teaching experience. The school where she is currently employed has 1 400 enrolled learners and 70 teachers.

- **Learning opportunities for HoDs.**

HoD 3 received no training from the school where she is currently employed, nor did she attend any of the training initiatives offered by the Gauteng Department of Education or any other professional body. The only training she has received for the role of HoD was the experience she gained by being grade leader.

- **Experiences and perceptions of learning opportunities**

HoD 3 admits that the role that she had as a grade leader prepared her to some extent for the role of an HoD, as she was “*responsible for the people*” in her grade and managed certain aspects on behalf of the HoD. She believes that her

experiences as a Post Level 1 teacher also helped her because she now has a better understanding of the “*curriculum and its implementation*”. She explains that various HoDs and principals under whom she worked throughout her career helped her by “*delegating specific duties*” to her that helped to prepare her for a leadership position.

- **Challenges experienced by newly appointed HoDs**

As an aspiring HoD, HoD 3 found it difficult to apply for HoD positions. This was mainly due to a lack of feedback when applications were unsuccessful. She therefore did not know how she could improve to be appointed as an HoD.

One of her biggest challenges was the “*acceptance from staff*” when first assuming her new position and getting everybody on the same page. She also found it difficult to implement the decisions made in the management meetings.

- **Skills required to be an HoD**

According to HoD 3 good communication skills is of the utmost importance if you want to be effective as an HoD. According to her, good interpersonal skills are also essential if one is to run a department smoothly. She also believes that an HoD should be good at time management to prioritise tasks clearly. She explains that as an HoD one should “*be innovative and think on your feet*”. She strongly feels that newly appointed HoDs should have an internship programme where they are under the supervision of the previous HoD and can learn all the skills required of an HoD from experience and from a mentor.

- **Structures in place for developing HoDs**

The school where she is currently employed uses grade heads and subject heads to empower teachers as future leaders. Some duties of the HoDs, like the setting of break duty rosters, compiling term planners or mentoring new teachers are “*delegated to aspiring HoDs*” as a form of informal leadership development.

4.5 HOD 4 – HOD: FOUNDATION PHASE

- **Biographical background and information**

HoD 4 works at a primary school that employs 60 teachers and therapists and has 380 enrolled learners. She has been an HoD for four years and has been employed

for a period of nine months at her current school. She has 14 years of teaching experience of which eleven was as a Post Level 1 teacher. She is one of seven HoDs at the primary school and is the only Foundation Phase HoD.

- **Learning opportunities for HoDs.**

HoD 4 never had any form of formal or informal training and never had “*induction for a new HoD*”. She claims that her school never knew about workshops offered for HoDs by the Gauteng Department of Education and as a result she never attended. She was however a member of the school governing body at her previous school.

- **Experiences and perceptions of learning opportunities**

HoD 4 experienced “*a lack of guidance*” when assuming the position as she had to “*figure out what to do*” on her own. From her own experiences she has learnt to try and make staff members see the bigger picture and once they grasp the whole idea, they “*koop makliker in*” (more inclined to buy in). She also feels that being on the SGB helped her a lot, especially when it comes to aspects relating to the school budget. Experiences she gained as a Post Level 1 teacher also taught her how to be “*approachable yet assertive*” when it comes to managing and leading your team. She also believes that if the SMT had given her more and shared responsibility, “*then she would have been better prepared for the role*”.

- **Challenges experienced by newly appointed HoDs**

HoD 4 emphasized that opportunities to apply for an HoD position are very scarce and “*not easily available*”. She feels that people stay at their schools for a long period of time to become HoDs and somebody usually needs to move out before a position becomes available. When a position opens, internal applications are favoured.

As a newly appointed HoD and with only Post Level 1 teacher experience to fall back on, she did not know what was expected of her as an HoD “*because you haven’t had the opportunity to do any of that*” and that she “*basically had to figure out*” what she had to do as an HoD. She also feels that at the school where she is currently employed, all decisions are made by senior management and her opinion and input are “*rarely asked*”.

- **Skills required to be an HoD**

HoD 4 attests that time management is the most crucial skill an HoD needs as one simultaneously has to deal with your own teaching obligations as well as “*a lot of other responsibilities*”. She also says that one should be able to prepare thoroughly and well in advance as there is no time between everything else to prepare for your teaching responsibilities. She states that one has “*to be extremely prepared for your teaching responsibilities...on top of your other responsibilities*”. She is also of the opinion that HoDs need in depth knowledge of the curriculum, the skill to adapt and the ability to teach your team on how to adapt the curriculum. Lastly, she feels that an HoD should be able to “*involve parents*” and work as a team.

- **Expectancies of HoDs**

She believes that HoDs should be able to “*find the balance*” in being task driven and people driven. Your team members should feel that you value their input and at other times they must fall in with the HoDs’ planning and decisions. By keeping “*tabs on teachers*” as an HoD you are expected to see to the quality of education.

- **Structures in place for developing HoDs**

HoD 4 contends that a mentorship programme is ideal for new HoDs as well as aspiring HoDs. One should give aspiring HoDs extra responsibilities as that serves as “*an opportunity to grow*”. Newly appointed HoDs should be trained in aspects such as administration, human resource management as well as curriculum matters.

4.6 HOD 5 – HOD: SENIOR PHASE GRADE 7

- **Biographical background and information**

HoD 5 is employed at a primary school that has 880 learners and 30 staff members and situated in the Tshwane West district. He is one of four HoDs in the Gr. 4 – 7 section of the school and is the HoD of the senior phase that involves only the Gr. 7’s. He has eleven years’ teaching experience as a Post Level 1 teacher. He has recently been appointed as an HoD and has been an HoD for about nine months.

- **Learning opportunities for HoDs.**

HoD 5 received no formal training before assuming the role of HoD. He only received the files of the HoD before him. He did however attend an HoD training session

presented by the Gauteng Department of Education which was a once off, one hour long session.

- **Experiences and perceptions of learning opportunities**

HoD 5 indicated that it is difficult for a school to acknowledge that their Post Level 1 teachers aspire to be HoDs and that they lack the means to train them. The once off session that he attended was according to him “*no training at all*”, but instead an “*informative session*” where they just told them how things are going to work. As an HoD he feels that there was no training at all and the jump from Post Level 1 to Post Level 2 was a matter of “*jump in and swim*”. He does however feel that the skills he does have, he learnt through his experiences as a Post Level 1 teacher. He also stated that his previous school gave him more responsibility when they realised he wanted to become an HoD which did help him a bit when first assuming the role of HoD. He reinforces this by stating that “*most of the things I (he) do today*” is because “*of the stuff I (he) learnt as a Post Level 1 teacher*”.

- **Challenges experienced by newly appointed HoDs**

HoD 5 feels that the biggest challenge of an aspiring HoD is to gain the experience to be an HoD. He states that “*most of the schools where you are, do not want to train you to become an HoD.*” One does not get to experience the role before you are in it, which leads to the majority of HoDs to be unequipped for the role they are taking on. When asked about the jump from Post Level 1 teacher to HoD he stated the following: “*although the jump doesn’t look huge, I think it is a huge jump*” and that “*nothing can prepare you for that jump*”. Starting as an HoD at a new school was very challenging for HoD 5 as you walk into an environment without knowing the people or how they operate. This makes it difficult to change things as most people are “*reluctant to change*” and comfortable with the way they have been doing things for years.

- **Skills required to be an HoD**

He feels that the most important skill an HoD should possess is the ability to manage the department and the staff effectively. One should also be able to focus on various aspects and balance your own teaching responsibilities along with your department’s subjects and teachers.

- **Expectancies of HoDs**

According to HoD 5 the biggest expectation of HoDs is to successfully “*manage people*”. He believes that the human resource function is important because it influences the way in which an HoD talks to and approaches members of their department and how they approach “*working with people*” and how to “*deal with people effectively*”. He emphasises how important it is to work with people by stating the following: “*the way you talk to people, the way you approach people, is really different in how they treat you.*” Lastly, he states that as an HoD one should always be objective which will allow staff members opportunities to grow and change.

- **Structures in place for developing HoDs**

HoD 5 states that there are no structures in place at his school to better himself as an HoD. He feels that the senior management team likes doing their own work which in effect means that he is denied the opportunity to grow, because they do not delegate deputy principal responsibilities to him. Opportunities are seldomly passed on to him. He states that in a situation like this “*there is no room for you to do a lot of things on your own or try a lot of new things that can make you grow*”. He believes that HoDs should be trained by giving a Post Level 1 teacher some responsibility of the HoD and allowing them to work under the HoD and report back to them as this will help them gain experience. He feels that HoD development programmes will help prepare future HoDs.

4.7 HOD 6 – HOD: GRADES 4 - 7 MATHEMATICS, SCIENCE AND TECHNOLOGY

- **Biographical background and information**

HoD 6 is the HoD of the Mathematics, Science and Technology Department of the Gr. 4 - 7 section of his school. He is one of four HoDs in the Gr. 4 - 7 phase. The school is situated in the Tshwane West district and has 1 400 learners and employs 52 teachers. He has twelve years of teaching experience and has been working at the school where he is now employed his whole career. He has been an HoD for the past two years after being a Post Level 1 teacher for ten years.

- **Learning opportunities for HoDs.**

HoD 6 attended only one workshop and did a course on management and leadership on his own accord.

- **Experiences and perceptions of learning opportunities**

According to HoD 6 the one workshop he attended did not prepare him to be an HoD and should rather be considered as an information session on the state of education. He contends that the workshops presented by the Gauteng Department of Education does not help to prepare HoDs. The course that he enrolled himself for, taught him *“everything he knows about not only being a teacher, but being a manager, being a leader and showing him how to work with people”*. He argues that *“if you want to get anywhere in life, you need to improve your own skills”* by self-study and to use your own initiative. He also stated that he would have liked it if somebody had *“trained him upfront”* and told him what he will need to do as an HoD and how to do it.

- **Challenges experienced by newly appointed HoDs**

According to HoD 6 the application process of becoming an HoD is one of the biggest hurdles posed to aspiring HoDs. Nobody knows how to prepare for interviews for new HoDs – everybody *“tells you that you must study policies”*, but when you get to the interview, they give you scenario-based questions. This remains a challenge as most interviewees have not had experience as leaders and managers or had been in situations that gave them enough experience to adequately address the questions posed to them. He also feels that because there is no actual training for aspiring HoDs *“they don’t really prepare you for what you are going to do”* and therefore nobody can prepare for what awaits them as HoDs. He also mentioned that most HoDs are appointed internally which means that most aspiring HoDs will not get a fair chance to become an HoD unless they wait for a position to open at their own school.

As a newly appointed HoD he struggles a great deal with managing people, coping with the new workload, as well as knowing the content of the relevant policies. He states that *“starting as an HoD was very difficult”*. He admits that he has made *“a bunch of mistakes”* and that every day is still a learning process. He also said that he never thought that being *“a manager and leader can be so difficult”*.

- **Skills required to be an HoD**

HoD 6 stated that in order to manage a department effectively, one needs the skills to be both a good manager and a good leader: “50 % *management and then 50% leadership*”. One should also be good at multi-tasking to do everything expected of you. He stated that any new HoD who “*cannot multi-task will stress themselves out*” and will not be able to run their department smoothly. You also need the ability to plan properly – both your own academic planning and that of your department. Due to the high demands on HoDs, one should have perseverance as the task does not get easier or the workload lighter.

- **Expectancies of HoDs**

HoD 6 stated that HoDs need to be strong leaders and managers by also keeping the human nature and background of the members of their department in mind. This is not an easy task as you need to work strictly according policies but also not “*infringe on their human being*”. He reinforced this statement by saying that “*as an HoD you need to be sensitive*” to people’s needs.

- **Structures in place for developing HoDs**

At the school where HoD 6 is currently employed, there are no initiatives in place for him to better himself as an HoD or to prepare aspiring HoDs. According to HoD 6, the ideal way in which to prepare HoDs should be to train teachers “*in house by putting a system [in place] to help them to know how to become an HoD*”. In so doing, they will gain experience that will help them step by step to become HoDs. He feels that there should also be an assigned person in every school that newly appointed or struggling HoDs can approach when they need guidance and assistance. Such a person can “*help struggling HoDs or starting HoDs to manage their job(s)*”.

4.8 HOD 7 – HOD: GRADES 4 – 7 LANGUAGES

- **Biographical background and information**

HoD 7 works at a primary school in the Tshwane West district and has been a teacher for over 14 years. She has been employed at her current school for twelve years, of which eleven was as a Post Level 1 teacher. She is in her first year as an

HoD. The school has 1 373 learners and 45 teachers. They have four HoDs in the Gr. 4 - 7 section and she is the HoD in charge of Languages.

- **Learning opportunities for HoDs**

HoD 7 was involved in many managerial activities and performed multiple tasks prior to her promotion to HoD. The senior management team “*engaged me (her) in a lot of activities and a lot of managerial tasks*”. She shadowed the current HoD and frequently assisted her with organisational matters pertaining to the department as well as “*managing some of the tasks she was doing*”. She did attend a workshop for HoDs when she was a Post Level 1 teacher.

- **Experiences and perceptions of learning opportunities**

HoD 7 indicated that the SMT helped her a great deal and gave her enough guidance to fulfil her role as HoD. She stated that “*the management team is helping her a lot, they give guidance and I am called to report back*”. This helped her to reflect and grow from her experiences and mistakes. The principal and the HoD that she shadowed also checked her work which inevitably raised the standard of her work. She stated that as an HoD, “*most of the things you must do on your own*” and that you have to take it upon yourself to do your own research and come up with new ideas for your department.

- **Challenges experienced by newly appointed HoDs**

As an aspiring HoD, HoD 7 attended a workshop aimed at preparing new HoDs. However, as an aspiring HoD the information that was given was of such a nature that she did not grasp the complexity of the role. She explained as follows:

“I attended a meeting but realised it was for a workshop and I did not know that it was for HoDs and I was a mere teacher, hearing about HoDs was hectic”.

HoD 7 indicated that time management is one of her biggest challenges as she works at a big school and she is the only one responsible for both Home Language and Additional Language in the Gr. 4 – 7 section of the school. Between her role as a language teacher and her responsibilities as an HoD she does not have enough time to get everything done in a day. This she explained as follows: “*I struggled with managing time*”.

- **Skills required to be an HoD**

Over the years HoD 7 has learnt that having skills to build meaningful interpersonal relationships with parents and colleagues is of utmost importance for your department to function smoothly and effectively. It is important to know each member of the department because everyone is different. You need the ability to apply different management tactics with different staff members. HoD 7 explains as follows: *“You have to apply different management tactics to different individuals because people are not the same.”*

- **Expectancies of HoDs**

According to HoD 7, HoDs need to be *“consistent, open and focused”* to maintain professionalism and to properly execute their responsibilities. She also stated that it is expected from HoDs always to give staff members accurate information that enables them to do their jobs properly. She explains: *“You need to be sure of the information you give to your staff members and you need to know the staff members because others are different”*.

- **Structures in place for the development of HoDs**

Her department has a large staff complement and it is easy to give everybody some responsibility and to distribute leadership roles within the department. This leads to members of her department gradually learning through experience. For example, members of her department are expected to take turns to control and moderate books and files. After the moderation they must give their feedback to her so that she can guide them through the process and assist where needed. This she articulated as follows:

Because my department is so big, there are some tasks that are done by my colleagues, like controlling of books and files – sometimes a teacher might be assigned to monitor books and so on ... after they have been moderated they have to give me feedback and we go through that information together then we can see if there are mistakes and we can correct them.

HoD 7 explained that the proper way to train new HoDs is to give them their duties in a written format as there can then be no confusion regarding expectancies, roles and responsibilities.

4.9 HOD 8 – HOD INFORMATION TECHNOLOGY

- **Biographical background and information**

HoD 8 works at a primary school in the Tshwane East district and is one of three HoDs in the Intermediate Phase of the school. The school has 1 660 learners and 100 teachers. She has eleven years of teaching experience and has been working at her current school for ten years. She was internally promoted as HoD three years ago and was officially appointed in the position only one year ago.

- **Learning opportunities for HoDs.**

HoD 8 attended courses offered by the South African Teachers' Union (SAOU) and the Federation of Governing Bodies of South African schools (FEDSAS) that her school allowed her to attend. She also completed a management course that lasted a year together with her principal and deputy principal. She attended no workshops presented by the Gauteng Department of Education.

- **Experiences and perceptions of learning opportunities**

HoD 8 indicated that preparation to be an HoD started when she was a Post Level 1 teacher. She explained as follows:

*If you can manage your classroom, then you can manage your grade,
[and then] you can manage your department.*

The courses she attended of her own accord helped her a great deal with everything she needed to know about the paperwork and regulations that come with being an HoD. She also expressed a strong opinion that “*any person that wants to apply for the next Post Level must study*”.

She holds an Honours degree and is busy pursuing her Master degree and believes that without further study, one should not even be considered for a promotion. She says that being “*self-driven is something that makes that position available*” to you. She finds that the other courses she attended were sometimes helpful and other times not.

- **Challenges experienced by newly appointed HoDs**

According to HoD 8, one of the biggest challenges of aspiring HoDs is to be promoted from a Post Level 1 teacher to an HoD. She states that there are not many HoD positions available and even less at the school where one would be working at currently. You are “*stuck*” unless you are willing to “*carry on to a new school, which most teachers don’t want to do*”.

HoD 8 stated that it was difficult for her to suddenly take on the role as leader of her teacher friends and colleagues because being *one level higher ... now you are in a different situation*”.

She also found it challenging to assist some of the older teachers with new technology because they are not comfortable working with computers.

- **Skills required to be an HoD**

HoD 8 emphasised the fact that to be an effective HoD, one needs to have excellent communication skills and be able to talk openly to your staff. Linked to good communication, she mentioned that an HoD needs to have good listening skills in order to make members in your department feel “*heard*”.

According to HoD 8, HoDs must also be able to think on their feet and adapt quickly to new situations and make changes if needed. She stated that an HoD must be able to “*have your admin under control*”. HoD 8 strongly feels that as an HoD you must be an expert in the use of computers. The normal response “*I am okay with computers*”, is not good enough as an HoD must set the example to their department.

- **Expectancies of HoDs**

HoD 8 is of the opinion that as an HoD one must be able to deal with a variety of personalities and have different types of leadership styles in order to adequately manage a department. She also states that it is expected from HoDs to foresee different scenarios and to make good decisions. This view she articulated as follows: “*...you must be able to think on your feet...and be able to weigh up your options.*”

- **Structures in place developing HoDs**

The school where HoD 8 is currently employed appointed grade heads and subject heads to “*broaden their responsibilities*”. Her current deputy principal acted as her

mentor before she was appointed as an HoD and “*played a significant role*” to prepare HoD 8 for where she is today. HoD 8 explained that her deputy principal and their current school governing body gives her a lot of freedom and allow her to gain experience in order to better herself as an HoD, as well as preparing her for any further promotions. She explained this as follows:

They give me freedom to do things within restraint and I think that is a good thing because you are also learning how to do your job better and be able to become a Post Level 3.

4.10 DISCUSSIONS AND FINDINGS

In the following section of this chapter, every identified theme presented in the data will be analysed and interpreted. Comparisons will be drawn between the themes identified and what were discussed in the literature as presented in Chapter 2 as well as the theoretical framework of this study as discussed in Chapter 1.

4.10.1 Learning opportunities for HoDs

The data revealed that HoDs do not all have equal chances and the same learning opportunities that prepare them for the role of an HoD. One thing that most HoDs agreed on is that the experience they have gained as Post Level 1 teachers ultimately contributed to their skillset and expertise. Only HoDs 6 and 7 did not refer to their learning opportunities as Post Level 1 teachers. There is also strong evidence that most newly appointed HoDs benefited from a mentorship programme as HoDs 1, 2, 3, 7 and 8 stated that they were appointed a mentor either before assuming the position as an HoD or when newly appointed. It was also evident that most HoDs were given some form of additional leadership responsibility before they became an HoD. The following table indicates which leadership responsibilities were distributed to them that served as a learning opportunity:

Additional responsibility:	HoD
Grade leader	HoD 2, 3, 8
Subject head	HoD 1, 6
Member of the SGB	HoD 2, 4
Assigned HoD related responsibilities	HoD 1, 3, 5, 7

Table 4. 2 Additional leadership responsibilities as learning opportunities.

The data therefore clearly reveal that all HoDs had some form of responsibility delegated to them that formed part of their experience in becoming an efficient HoD. This can be linked to some of the fundamentals of Kolb's Experiential Learning Theory that underlies the theoretical framework of this study. Kolb's Experiential Learning Theory emphasises that learning occurs by constructing knowledge based on contextual demands (Kolb & Kolb, 2009). This occurs when HoDs are given new responsibilities and tasks as they gradually learn through their day-to-day experiences.

Although there is evidence that HoDs were exposed to formal training (in the form of workshops or courses), the evidence suggests that this is somewhat sporadic. HoDs 2, 6, 7 and 8 indicated that they attended workshop offered by professional bodies that helped them in their task of becoming an HoD. Significantly, HoDs 1, 2, 6 and 8 revealed that they enrolled themselves in courses which suggest that they identified the necessity to create their own developmental opportunities. The data revealed that only HoDs 3, 4 and 5 received no formal training whatsoever on becoming an HoD.

One of the major obstacles in the leadership development of HoDs is that training for leadership roles are uncoordinated and inadequate (Bush & Jackson, 2002). As evident in the data, one can come to expect different experiences from HoDs as their professional development will solely rely on the discretion and expectations set out by their respective school management teams and the school governing bodies. As indicated in Chapter 2, leadership development relies strongly on the link between theory, practice and the needs of the individual (Sullivan, 2013), which only emphasise the need for formal training (theory) as well as the need to gain experience as suggested by Kolb's Experiential Learning Theory.

It is prescribed in the Personnel Administrative Measures (PAM) that it is the responsibility of the principal and deputy principal to guide and supervise the work and performance of staff members (RSA, 2016). This policy also states that it is the role of the principal to be responsible for the development of staff training programmes (RSA, 2016). Therefore, the provision of sufficient leadership development opportunities for HoDs is the responsibility of the senior management of a school. The efficiency of professional development for HoDs and their opportunities to learn rely solely on how it is managed. This creates discrepancies

from school to school in terms of how aspiring HoDs are professionally developed to fulfil a future role as leader and manager.

4.10.2 Experiences and perceptions of learning opportunities

The experiences gained by HoDs when they were still Post Level 1 teachers contributed to their effectiveness as HoDs. Kolb's Experiential Learning Theory revolves around the fact that leaders will rise through a variety of informal routes and the knowledge they gained through experience. As evident in the data obtained from HoDs 1, 2, 3, 5, 7 and 8, almost all HoDs were of the opinion that being a teacher taught them many of the skills needed as HoDs. HoD 2 stated that her Post Level 1 experience taught her "*about time management, how to handle pressure and how to work with difficult parents*". HoD 3 states that it helped her because she now understands "*the curriculum and its implementation*" better. HoD 4 attests that Post Level 1 taught her how to be "*approachable, yet assertive*". Kolb and Kolb (2009) argue that learning occurs through doing and by integrating the functions of thinking, feeling, perceiving, and behaving. This is reinforced in the data as the skills needed to be an HoD are gained through experience and exposure to new situations and challenges.

The data further suggest that any form of a mentor has an immense influence on the learning process of HoDs, as most of the HoDs emphasised the impact of a mentor in their careers. HoD 1 had a mentor who "*guided him to be a better HoD*" and to gradually "*get the hang of things*". HoDs 2 and 3 stated that they believe it was not the influence of one single person that influenced them, but rather various mentors throughout their teaching careers. HoD 7 confirmed that her mentor taught her a lot about being an HoD and gave enough guidance to enable her to fulfil her role as HoD.

Even with the evidence of mentors presiding strongly, data show that some of the HoDs indicated a lack training and support. For example, HoD 5 suggested that he received "*no training at all*" and that the transition from a teacher to an HoD was a matter of "*jump in and swim*". HoD 4 stated that there was "*lack of guidance*" when assuming the position of HoD and she was completely on her own "*to figure out what to do*". She contended that if more responsibilities were given to her earlier on, "*she would have been better prepared for the role*" of HoD. This is in strong opposition to

the general view among the HoDs that they were given responsibilities and acquired the necessary skills through experiences gained by performing leadership roles such as grade head, subject head and being a member of the SGB. Because experiential learning relies so strongly on concrete and complex problems to be encountered in everyday practice (Huber, 2013) in order for learning to take place, it is essential for aspiring HoDs to be given the opportunity to actually gain experience through daily encounters from which they can learn and develop from (Guthrie & Jones). Aspiring HoDs that are given the opportunity to take on more responsibilities will benefit from it, but literature indicates that those who are not given the opportunity to gain new experiences will be less likely to grow as leaders or enhance their professional development as learning occurs between an individual and their environment (Kolb & Kolb, 2009) and complex and authentic experiences that arise in the process (Huber, 2013). However, even though HoD 7 suggested that she had the necessary support from a mentor and leadership experiences as a teacher, she remarks that as an HoD, *“most of the things you must do on your own”*.

The data indicate contradictory experiences regarding workshops presented by the Gauteng Department of Education. HoDs 1 and 5 indicated that the workshops presented by the Gauteng Department of Education were a waste of time, whereas HoD 2 stated that those meetings were very insightful. HoD 8 described those meetings as sometimes helpful and other times not. On the other hand, HoDs 6 and 8 described courses presented by other professional organisations such as SOS, SAOU and FEDSAS as beneficial.

Some HoDs (1, 6, 8) emphasised the importance of attending courses on your own accord and being self-driven. HoD 1 considered formal and informal training as equally important, but indicated that tertiary education is of the utmost importance if you want to further your career. Literature also emphasised that educational leaders should take charge of their own professional learning (Zhang & Brundrett, 2010) as it is their responsibility if they are to become professionally competent.

HoD 4 reinforced this notion by attesting that in order to get anywhere in life you need to improve your own skills by enrolling for additional courses and doing self-study. HoD 8 confirmed this sentiment by stating that *“being self-driven is something that makes a position available to you”* and that *“any person applying for the next level – must study”*. Snoek (2014) strongly believes that any form of formal

leadership development, as stated above in the form of post graduate studies, has a dramatic effect on leadership practices of an individual and therefore will contribute to their effectiveness as an HoD. However, experiences gained through experiential learning, as proposed in Kolb's Experiential Learning Theory, has shown that the most substantial learning opportunities are encountered in the workplace rather than in off-the-job training (Zhang & Brundrett, 2010).

In South-Africa the minimum requirement to become an HoD is three years of teaching experience. This leads to most newly appointed HoDs having little experience to fall back on, even if they were granted ample opportunities and experiences to learn. Any form of further training or formal training like pursuing post graduate studies should not be underestimated as it will benefit all those who have not had meaningful or enough experiences to learn from.

4.10.3 Challenges experienced by newly appointed HoDs

4.10.3.1 Challenges experienced prior to being appointed as an HOD

Two main challenges experienced by aspiring HoDs emerged from the data. They are the application procedure when applying for an HoD position and gaining appropriate and relevant experience.

HoD 3 emphasised the fact that applying for an HoD position is not an easy task as one never gets feedback on how to improve when applicants fail to secure the position, whereas HoD 4 revealed that HoD positions are scarce and "*not easily available*". According to HoD 3, 5 and 8 employees tend to want to stay at their schools and will have to wait for an HoD position to become vacant. The implication is that there is limited room for upward mobility "*unless you are willing to carry on to a new school which most teachers don't want to do*" – HoD 8. HoD 5 also commented on the difficulty of the application process, but then emphasised the interview part. Interviews tend to be experience based and as an aspiring HoD you do not have that experience to rely on.

The next challenge identified in the data links to the lack of experience that HoD 5 referred to – he states that one will only get the necessary experience once appointed as an HoD. HoDs 4 and 7 indicated that due to a variety of reasons, aspiring HoDs are not given a chance to gain experience prior to being appointed as an HoD. Literature indicates that it is often overlooked that being an HoD is a

stepping stone to become a member of senior management (Naicker & Mestry 2013), which leads to not enough investment, training or learning opportunities being given to HoDs. According to Kosgei (2015) the lack of funds and the lack of time have a direct effect on the implementation of any form of professional development. Aspiring and newly appointed HoDs therefore lack the experiences and opportunities as proposed in Kolb's Experiential Learning Theory to effectively learn through doing. They thus do not get the chance to reflect on their own experiences which will ultimately allow them to grow as leaders and enhance their professional development.

4.10.3.2 Challenges experienced by newly appointed HODs

Data indicated that the set of challenges that newly appointed HoDs face are different from that of aspiring HoDs. One challenge that emerged strongly from the data was the issue regarding gaining respect from colleagues as a newly appointed HoD. This issue was raised by HoD 1, 3, 5 and 6. HoD 3 argued that the most difficult part of becoming an HoD was "*acceptance from staff*", whereas HoD 1 experienced it difficult due to the fact that you need to manage people who are much older and more experienced. This data were reinforced in literature as many HoDs face resistance from teachers in their department (Ghavifekr, Hoon, Ling & Ching, 2014). Maintaining healthy relationships will stay a challenge throughout an HoDs career but is essential to run a department efficiently. Kolb's Experiential Learning Theory involves not only reflecting on one's own behaviour but also the behaviour of others, such as the teachers in your department. By reflecting on their behaviour and actions will allow an HoD to gain experience in managing their department as well as getting everybody to work together as a team.

Getting older staff members to change the way they have been doing things, especially when it comes to technological advances, is another challenge that emerged from the data. For example, it was challenging for HoD 8 to assist older teachers with computers and HoD 1 stated that it is "*a huge obstacle to overcome*" to convince older teachers to make use of technology.

HoD 8 found it difficult to be promoted ahead of their Post Level 1 colleagues with whom they have become friends. For example, she mentioned how difficult it was for her to take on the role as leader and being "*one level higher*" than her friends.

Data revealed that some HoDs experienced challenges relating to getting their department to work together as a team. For example, HoDs 2, 3, 5, 6 felt that it remains a challenge to get everybody on the same page and to work towards the same academic goals within their department.

The last challenge that emerged from the data pertains to the ambiguity and uncertainty of the role of HoD. In this regard HoD 2 stated this as a challenge owing to the fact that each school has different expectations of HoDs. According to her, some schools expect too much of HoDs and that their workload is unbearable. On the other hand, HoD 4 indicated that she had major responsibilities at her previous school, but at her current school she does not take part in any decision making and that her input and opinion are “*rarely asked*”, which can be demoralising and just as frustrating. According to HoD 5 walking into a new school is highly challenging because you do not have an idea of how they operate. Data from HoD 6 described how demanding it is to walk in as an HoD and how he struggled with the new and unfamiliar environment and workload. This challenge is summed up very accurately by the data gathered from HoD 2 who stated the following:

Other than the responsibilities summarised in the PAM – you must do what your principal tells you to do.

This statement clearly illustrates the discrepancies that exist regarding the role and workload of HoDs.

4.10.4 Skills and expectancies required to be an HoD

The data revealed that the following skills and expectations are presumed to be required to be an effective HoD:

- **Communication skills**

Three of the eight HoDs identified good communication skills as being essential to manage a department effectively, totalling 37,5% of the participants sharing the same belief. HoD 1 stated that you “*will struggle to get ahead of your department*” if you do not have good communication abilities. According to HoD 8, an HoD should be able to communicate, as “*openly*” as possible. Adequate communication skills are emphasized in Chapter 2 of this study. As HoDs are expected to give regular feedback to employees, they should be able to communicate clearly. HoDs are in

daily contact with the senior management team as well as with the teachers (Marishane, 2016) which demands proper communication skills (Saul, 2019). Policy documents such as the Personnel Administrative Measures (PAM) also highlight the importance of communication skills as HoDs should meet with parents and cooperate with colleagues.

- **Organisational skills**

Organisational skills were deemed important by 25% of the participating HoDs. The literature and the Personnel Administrative Measures emphasise that HoDs should be able to organize meetings (Leithwood, 2016), properly plan all things relating to their department (Javadi, 2014), and see to it that time tables and work schemes are well thought through and accurate (RSA, 2016).

- **Planning and administrative skills**

The ability to plan thoroughly and perform several administrative tasks while simultaneously carrying a teaching load are considered essential by 62,5% of the HoDs. HoD 8 stated that *“you need to have your admin under control”*. The Personnel Administrative Measures (PAM) reinforces this data as it stipulates that all administrative responsibilities of staff members are the responsibility of the HoD. This includes managing and coordinating work schemes, coordinating stocks/provisions/textbooks as well as overseeing reports. Saul (2019) emphasises the dual role of the HoD as both teacher and administrator. Literature adds the controlling and checking of mark sheets, moderating examinations (Basset, 2016), time tabling as well as setting of rosters to the list of administrative tasks expected of an HoD (RSA, 2016).

- **Time management skills**

The ability to manage one’s own time is considered vital by 62,5% of the HoDs. For example, HoD 3 stated that proper time management is crucial as it enables you to prioritise tasks. It is a common occurrence that HoDs lack the time to do all what is expected of them (Basset, 2016; Leithwood, 2016; Javadi, 2014). The Personnel Administrative Measures (PAM) document stipulates that an HoD should spend 85 – 90% of their time teaching which leaves little time to execute their other duties. This leads to the conclusion that an HoD should be able to manage their available time in

such a manner that they do not neglect either their teaching responsibilities or their managerial responsibilities.

- **Interpersonal skills**

62,5% of the participating HoDs attested to the fact that good interpersonal skills are needed as an HoD because you work with people day in and day out. HoD 2 stated that as an HoD you cannot have a “*silo mentality*” and that you need to work with your team. According to HoD 4, good interpersonal skills will allow you to “*involve parents*” and to work as a team. She also stated that finding the balance between being task driven and people driven was essential and that acquiring that balance required excellent interpersonal skills. According to HoD 7 interpersonal skills will enable one to build meaningful relationships with parents and colleagues and that those relationships are essential if you are to run a department effectively. Excellent interpersonal skills are also regarded as crucial. Leithwood (2016) argues it is the individual HoD’s responsibility to create a healthy work environment for all staff members. This requires an HoD to have the necessary interpersonal skills to create such an environment by keeping staff accountable and instilling collective ownership. Leask and Terrell (2013) also emphasize the importance that HoDs should be able to cultivate the skill to create and maintain interpersonal relationships as it is the foundation of a well-functioning department.

- **Listening skills**

Four of the participating HoDs (50%) indicated that as an HoD one should have the ability to listen to your team and make them feel “*heard*” (HoD 8) in order to feel that their input is valued. This is supported by Saul (2019) who argue that an HoD is expected to act as an advisor and counsellor. This means that an HoD should be able to listen attentively to what is being said by teachers as well as liaising with them to maintain good teaching standards and practices.

- **Knowledge regarding curriculum matters**

The data indicated that 50% of the HoDs are of the opinion that one should have adequate knowledge of the curriculum and should be a subject specialist to properly lead your department. HoD 4 explained that an HoD must have “*in-depth knowledge*” of the curriculum and should have the ability to adapt the curriculum in order to teach staff members how to adapt the curriculum. The academic role of an HoD is of

utmost importance and HoDs should not only have extensive pedagogical knowledge (Leithwood, 2016), but should also be able to translate curriculum objectives in such a way that is can be practically executed in the classroom (Saul, 2019). In addition, HoDs are expected to be subject specialists as well as be able to monitor the quality and consistency of the curriculum (Javadi, 2014). The Personnel Administrative Measures (PAM) strongly contribute to this argument by adding that HoDs should be able to guide and support teachers when curriculum related problems arise, promote quality education, and be aware of the latest teaching strategies and approaches to teaching.

- **Technological abilities**

HoDs 1 and 8 indicated that it is important for HoDs to excel in the use of modern day technology. HoD 8 stated that just being “*good with computers*” is not good enough and that an HoD should be better at it than most in their department. This sentiment is echoed to a lesser degree by HoD 1 who indicated that an HoD should be “*adequately equipped*” with regards to technology in the classroom. The Personnel Administrative Measures (PAM) document states that HoDs are responsible to guide staff regarding the latest techniques and approaches regarding teaching methodology. This can be applied to the use of technology in the classroom. To enhance education learners should be taught using the latest technology, and HoDs should be proficient in the use of technology in order to set the example as well as giving support where needed.

- **Adaptability**

Some of the HoDs regard the ability to adapt to circumstances as essential. For example, HoD 8 emphasised the fact that HoDs need to be able to think on their feet and quickly adapt to new situations. HoD 1 stated that you should look broader than the current educational system and adapt to improve towards a first world schooling system. HoDs should thus be equipped with skills that allow them to be flexible to work with the complicated and diverse nature of learners, teachers, stake holders and parents (Saul, 2019).

The table below illustrates the skills required by HoDs and the number of HoDs that recommended each skill respectively:

Skill/Expectation	HoD	Percentage
Communication skills	1, 3, 8	37,5%
Organisational skills	1, 2	25%
Planning and administrative skills	1, 4, 5, 7, 8	62,5%
Time management skills	1, 2, 3, 4, 6	62,5%
Interpersonal skills	2, 4, 5, 7, 8	62,5%
Listening skills	4, 5, 7, 8	50%
Knowledge regarding curriculum matters	2, 4, 5, 7	50%
Technological abilities	1, 8	25%
Adaptability	1, 8	25%

Table 4.3 Skills needed by HoDs

4.10.5 Structures in place for the development of HoDs

Three underlying topics pertaining to the professional developmental structures in schools could be identified in the data, namely mentorship programmes for aspiring HoDs, shared responsibility and development opportunities for current HoDs.

HoDs 1 and 3 have mentorship programmes in place at their schools in which aspiring HoDs are identified and mentored. This is supported by literature by Zhang and Brundrett (2010) arguing that activities such as mentoring, and coaching will contribute to the leadership development of an individual more than any form of formal training. The literature also attests to the fact that strategies such as mentoring help to create HoDs who are focused and are able to analyse problems before making decisions (Moorosi, 2014). These abilities that should be developed through mentoring strongly relate to Kolb's Experiential Learning Theory as these skills should be practiced through the process of action, reflection, experience and abstraction. Zhang and Brundrett (2010) also underline the fact that schools are moving away from formal leadership towards real world leadership that focuses on the experiences an individual can gain through involvement in the workplace. Thus, once again emphasising learning through gaining experience as set out in Kolb's Experiential Learning Theory.

According to HoD 3 some of the leadership responsibilities of HoDs are distributed to aspiring HoDs. This is a form of informal training. In literature this principle is referred to as distributed leadership (Botha & Triegaardt, 2014). Distributed leadership is based on the principle that leadership is a shared process involving numerous individuals (Liang & Sandmann, 2015). Distributing leadership and managerial related responsibilities to various staff members, including aspiring HoDs, allow them to learn through experience as required by Kolb's Experiential Learning Theory, as well as initiating interaction between individuals who share a collective identity as determined through their organisation.

HoD 1 identifies teachers with leadership potential and uses them to help with training regarding teaching related matters and in the process prepares them for some of the responsibilities of HoDs. By creating the opportunity for staff members to assume leadership roles will allow aspiring HoDs to improve the leadership qualities they possess. It will also give them the opportunity to, through experience, determine what they are good at and to better the competencies required by an HoD that they have not yet mastered. Harris (2004), also stresses that distributed leadership exist in the human potential that is readily available within an organisation and to utilise expertise where it exists, rather than looking for it only in formal positions.

Generally, the data reflect that HoDs make use of some sort of shared responsibility system to train and prepare aspiring HoDs. This also links to distributed leadership as it supports the notion that people will lead when it is needed and within their area of expertise (Liang & Sandmann, 2015). HoDs 2, 3, 7 and 8 all make use of either grade heads or subject heads to whom extra leadership responsibilities are distributed in order to help them gain experience if they were ever to pursue an HoD position and to "*broaden their responsibilities*". HoDs 2 and 7 are of the opinion that everybody in their departments should be kept accountable and share the brunt of responsibilities. Literature reinforces the data by attesting that the use of distributive leadership will allow the allocation of numerous roles and functions to all staff members that are involved (Harris, 2004), immediately creating a sense of cooperation as everybody needs to their bit in the area of their expertise. This will also give sufficient opportunities to learn and grow through experience. By letting staff gain experience by assigning bigger responsibility to them will slowly but surely get them comfortable with their responsibility.

The data also revealed that there are some schools that do not have any structures in place that offer a growth opportunity for aspiring or already appointed HoDs. HoDs 4 and 6 admitted to having no structures or initiatives in place to help prepare aspiring HoDs, whereas HoD 5 and 6 stated that their schools do not offer them, as already appointed HoDs, any professional development opportunities that will benefit them if they are ever to apply for a Post Level 3 position. A contrary view was expressed by HoDs 1, 2 and 8 as their schools distribute some responsibilities which are generally associated with a deputy principal to them which allows them the opportunity to grow. HoD 5, however, indicated that at his school, the SMT “*likes doing their own work*” which means that deputy principal duties are seldom passed onto him which withholds him from learning opportunities or gaining experience.

Some suggestions were made by the HoDs regarding what they think might be the ideal development programme for HoDs. The suggestions they made were as follows:

- Newly appointed HoDs should be formally trained in human resource management, administration and curriculum matters. When given formal training, HoDs will be able to use the knowledge attained and apply it to the contextual demands of their job descriptions. Using experiential learning as a basis will enable HoDs to learn through their own experiences gained through the process of trial and error.
- Aspiring HoDs should be trained by giving Post Level 1 teachers extra responsibilities. By applying Experiential Learning Theory, aspiring HoDs will be able to learn on the job in the workplace, not only saving time, but creating learning experiences that are contextually relevant.
- Aspiring HoDs should work “*in house*” under an HoD and regularly report back to gain experience. To learn through doing as well as reflecting on their own behaviour will contribute to the process of learning to be life-long as set out in the fundamentals of Kolb’s Experiential Learning Theory.
- Every school should have someone designated to mentor newly appointed HoDs. Literature indicates that any form of professional development, such as mentoring, will have an impact on an HoDs’ leadership practices (Zhang &

Brundrett, 2010). HoDs should be guided by mentors and gain sufficient experience that will allow them to grow as leaders.

Aspiring and newly appointed HoDs should receive a written induction manual containing all the expectations, roles and responsibilities of HoDs. Research by Kosgei (2015) strongly emphasises the ambiguity of the role of an HoD. By implementing a written manual, the expectations of HoDs will be clearly outlined and therefore more easily attained. Many HoDs are not sure what is expected of them due to the ambiguity of the role. Expectations will be more easily met if HoDs are aware of them and clearly understand what is expected of them. Not knowing what is expected of them influences HoDs negatively (Kosgei, 2015) as they lack clarity regarding their responsibilities. A manual will therefore help them to attain goals and meet expectations.

4. 11 CONCLUDING REMARKS

In this chapter the data were presented according to themes which emerged from the data and the literature review. The findings were then discussed. In the following chapter a conclusion will be drawn, and recommendations made relating to the research questions.

CHAPTER 5

CONCLUSIONS AND RECOMMENDATIONS

5.1 INTRODUCTION

This study aimed to identify what leadership development opportunities are in place for HoDs in public schools in Gauteng. Furthermore, this study also explored how these opportunities are experienced by both aspiring and newly appointed HoDs. Some light is also shed on the challenges experienced by newly appointed and aspiring HoDs. Using the research questions which guided this study, this chapter focuses on the findings and conclusions of this study as well as recommendations regarding leadership development of aspiring and recently appointed HoDs. Leadership development of HoDs is compared to expectations of HoDs as set out in the Personnel Administrative Measurements (PAM) and the skills needed to execute these responsibilities. The limitations of this study, as well as suggestions for further research, are also discussed.

5.2 CONCLUSIONS

The conclusions made through this study will be presented in correlation with the research questions.

5.2.1 Leadership development experiences of recently appointed HoDs

It is evident that having been mentored contributed significantly to the leadership development and success of those participants who were exposed to some form of mentorship programme, whether informal or formal. It is perceived that mentorship does not necessarily mean that one is assigned to one specific mentor, but that the input of a variety of role players impacted on the leadership development of participants throughout their careers. Most participants acknowledged former mentors such as their HoDs when still Post Level 1 teachers, principals and deputy principals that they once worked with, who helped and guided them to become the HoDs they are today. In this regard Zhang and Brundrett (2010) contend that leadership learning occurs when individuals interact through the social experiences within their workplace. HoDs therefore learn from others, as well as from their own experiences working and dealing with people every day. Therefore, for leadership

development to happen, aspiring and newly appointed HoDs should receive sufficient exposure to opportunities to develop their leadership skills and competencies. This is achieved through observing mentors (Javadi, 2014) throughout one's career. During such a process, useful competencies pertaining to for example decision making and problem analysis (Snoek, 2014) are acquired.

Participants in this study made it clear that the experiences that they underwent as Post Level 1 teachers contributed to the development of their leadership competencies and abilities they wield as HoDs. Kolb's Experiential Learning Theory reinforces this notion as according to Kolb, Boyatzis and Mainemelis (2014), concrete experiences are used as basis for reflections and learning. The skills required for being a teacher; such as managing your own classroom, managing learner discipline, managing curriculum matters, performing administrative tasks skills, as well as dealing with learners, parents and colleagues on a daily basis prepare you for the role of an HoD. These combined experiences develop you over time and prepare you for assuming a leadership position in a school. This aspect of leadership development takes the context of the specific HoD into account (Huber, 2013) which leads to the more successful development of leadership skills as learning occurs through the interaction of individual and their environment (Kolb & Kolb, 2009).

The perceived value of formal and informal training of HoDs varied amongst the participants, being based on their own experiences. Although no concrete conclusion can be made on the value of formal workshops, induction courses or district meetings, the importance of formal leadership development should not be underestimated. Pursuing further education and doing self-study and research are considered essential elements for the leadership development of all educational leaders, including HoDs. This implies that an HoD must be self-driven and should be able to initiate his or her own learning through which ever means necessary. According to Marishane (2016) formal leadership development will better the HoDs' problem solving skills as well as teach them to be accountable. Pursuing further studies will also contribute to the areas in which HoDs lack expertise (Snoek, 2014) and will allow leadership learning on a level that will benefit both the individual and the school.

Although these are conclusions drawn from a small number of participants, they nevertheless indicate that leadership development for HoDs is taking place in public primary schools. Even though personal experiences and context played a significant role in each participant's leadership development, there are certain commonalities in the experiences of all the participants in terms of their leadership development in becoming HoDs.

5.2.2 Learning development opportunities for aspiring and newly appointed HoDs

The structures in place in participating schools that allow aspiring HoDs to gain experience and develop the leadership abilities and skill sets of newly appointed HoDs varied significantly. It is evident that all aspiring and newly appointed HoDs do not have equal leadership development opportunities or the same exposure to gain experience that will allow them to transition smoothly to the role of HoD. Most of participants perceived that their leadership development experiences and the skills and competencies they attained as Post Level 1 teachers positively impacted on their effectiveness as HoDs. These experiences, although crucial, can however only be described as incidental learning that happened during day to day encounters and experiences. This correlates with other research findings that HoDs gain skills by trial and error of their own experiences, rather than formal developmental programmes (Basset, 2016).

The specific department or phase in which an HoD is appointed does not seem to have a major influence on the learning opportunities and experiences offered to HoDs. Leadership development opportunities and support in the Foundation Phase, Intermediate Phase and Senior Phase remain erratic and seem to be determined by the senior management team and organisational structures in place at the school where they are employed, rather than being bound to a specific phase. The implication is that the leadership development opportunities that are available tend to be generic in nature and not geared at specialisation in a particular phase.

5.2.3 Preparation for becoming an HoD

One other method of informal leadership development of HoDs that is clearly present in the participating schools is the use of mentorship initiatives. The positive effects of exposure to mentorship are clearly visible, easy to execute and a common

occurrence in the participating schools. HoDs that did not have the benefit of mentors strongly urges the implementation thereof in their schools as they feel that it could have benefited them if they had the opportunity of learning from a mentor.

Another strategy for the development of aspiring HoDs that is also commonly used in participating schools is the principle of shared responsibility and distributed leadership. Many participants were utilised in leadership roles before they were promoted to Post Level 2 positions which inevitably led to them gaining experience and developing leadership competencies. Generally, the participants were utilised in leadership positions such as grade heads and subject heads which allowed them to gradually develop their leadership repertoire, allowing them the opportunity to gain experience that would benefit them when appointed as HoDs.

The use of formal training presented by professional educational bodies varies greatly from school to school and amongst the participants. Some participants are not even aware of such workshops or courses, whereas others attend them regularly. No clear consensus existed among participants regarding the effectiveness of these workshops as some participants deemed them to be useful while others perceived such courses and workshops not useful in their leadership development. Some of the participants deemed it necessary to be self-driven when it comes to formal training opportunities. Courses that are attended from own initiative and post-graduate studies that will contribute to the development of leadership and managerial skills are recognized amongst newly appointed HoDs as a means of improving their own abilities as an HoD. To be appointed as an HoD in South Africa one needs a minimum of three years teaching experience. Aspiring and newly appointed HoDs that feel ill equipped for the task at hand are driven to seek training and preparation outside of the schooling system in the form of post-graduate studies. This also contributes to the skill sets and abilities of HoDs to vary greatly due to unequal opportunities regarding formal leadership development.

Even though they are in the minority, there are some HoDs that have received no formal or informal training and received no guidance or support and exposure to leadership experiences prior to or immediately after their appointment as an HOD. This emphasises that exposure to leadership development opportunities amongst aspiring and newly appointed HoDs are not equally accessible. The lack of leadership and management training in HoDs clearly add to the difficulty of the

already complicated role of HoDs (Basset, 2016). This leads to even more discrepancies in the leadership competencies of HoDs and flaws in the system when it comes to competencies expected of HoDs. The lack of guidance contributes immensely to HoDs being appointed without being prepared or equipped to do the job. Javadi (2014) states that the lack of management and leadership initiatives impede HoDs as certain competencies are expected from the moment they are appointed (Marishane 2016).

5.2.4 Challenges experienced by newly appointed HoDs and the competencies to overcome these challenges

Even though the training and leadership opportunities are sporadic and not fairly distributed amongst schools, the challenges faced by aspiring and recently appointed HoDs are generally similar. The whole application process to become a HoD is one of the main challenges that aspiring HoDs face. Several facets complicate the application process; all of which impede aspiring HoDs. The scarcity of HoD positions is the first hurdle, as the number of HoDs allocated per school is determined by the number of enrolled learners. Therefore, there is only a limited number of HoD positions available as determined by the Gauteng Department of Education. Schools that are financially strong may have additional HoD posts created and employed by their governing bodies. This however once again leads to equal opportunities not being available to all aspiring HoDs. Another factor that contributes to the scarcity of HoDs positions is the fact that the majority of aspiring HoDs prefer to stay at the schools where they were appointed as Post Level 1 teachers, favouring internal appointments. Aspiring HoDs from other schools therefore find it more difficult to compete for positions where there are internal candidates. The last hurdle in the application process is the actual interviewing process. The interviews are often experience and scenario based – expecting of the interviewees to reflect on past experiences. Aspiring HoDs would not necessarily have prior knowledge to rely on and therefore will often be disadvantaged. This is a vicious cycle as some HoDs are not being trained or given opportunities to learn, yet experience is needed to fulfil the expectations of the next post level.

Generally, the participants found it challenging to gain respect from older and more qualified teachers. They also found it difficult to get their department to work together as a team to reach the same academic goals. The role of an HoD is not only about

maintaining standards in your department but also fostering healthy relationships between colleagues (Leask & Terell, 2013). These goals, however, are not easy to achieve and stay a challenge throughout an HoD's career and will only improve with experience. A study done by Leithwood (2016) also indicated that numerous teachers will openly oppose an HoD. However, challenging this might be, recently appointed HoDs must come to the realisation that it is part of the job description of being an HoD and not necessarily a challenge experienced only by newly appointed HoDs. In the South African context where the minimum requirements to become an HoD is only three years teaching experience without any leadership or management experience, this aspect is a major challenge. This study found that due to a lack of experience and knowledge to work with people it is difficult for newly appointed HODs to deal with colleagues who are opposed to their decision making. They are not equipped to deal with these types of confrontations, nor do they have the interpersonal skills to get a department to work together as a team. HoDs need to be emotionally mature with high emotional intelligence (Saul, 2019) that will enable them to deal with issues such as opposition from staff members as well as collaboration (Saul, 2019). Expecting an HoD with three years' experience as a teacher to deal with these challenges is an unreasonable expectation. Kolb's Experiential Theory underlines the fact that adults who are involved in problem solving processes, learn through the problems they encounter in their daily work environment. This leads to them not only learning through the process (Huber, 2013), but also within the context of their own work environment. The four functions described in Kolb's theory, namely feeling, perceiving, thinking and behaving (Kolb & Kolb, 2009) are all integrated in the problem solving process and allow for optimal learning experiences for teachers who one day might want to become HoDs. HoDs with only three years of teaching experience are probably set up for failure as they lack the experience and knowledge that can be attained through exposure to leadership experiences.

The ambiguity of the role of the HoD remains a challenge to newly appointed HoDs as they are promoted to the post without a clear understanding of what the role of an HoD entails. This can be drawn back to the fact that the majority of HoDs lack experience and were not offered sufficient learning opportunities. If Kolb's Experiential Learning Theory is used as a basis for leadership development of HoDs,

they would have gained the necessary experience by the time they assumed the role of HoD. Literature also states that the ambiguity of the role of HoDs often leads to HoDs not executing their responsibilities as they are not aware of what is expected of them (Kosgei, 2015). Newly appointed HoDs therefore lack role clarity (Javadi, 2014) and can frequently not execute the complicated, demanding, and varied role and responsibilities expected of an HoD (Basset, 2016). Although the expectations of HoDs are set out in the Personnel Administrative Measures (PAM), the fact that responsibilities vary from school to school has a clear impact on an HoD's preparation to be successful. The fact that the senior management team of a school determines the specific responsibilities of HoDs contributes to the expectations varying greatly from school to school and contributes to the ambiguity of the role.

The workload of HoDs is currently a very popular topic in literature as the list of responsibilities expected from HoDs is constantly being changed and added to. HoDs are responsible for various aspects of their school and department (Javadi, 2014) and according to Basset (2016) these expectations and responsibilities have evolved to such an extent that the task is difficult for one person to manage, even more so for an inexperienced and ill prepared HoD. This study suggests the same. HoDs have their own teaching responsibilities and together with the pressure of constantly maintaining high standards in their departments, leading and managing their teams combined with all their administrative duties, they often struggle to cope. It also came to light that the workload of HoDs are not the same across the board which can be attributed to expectancies of HoDs differing from school to school as the number of HoDs appointed also differs from school to school. Expecting a Post Level 1 teacher with only three years teaching experience to be prepared for the demands of being an HoD may be unrealistic. The workload of many HoDs remains a tall order, even for more experienced HoDs as they are expected to teach 80 – 90% of their time at school and to fulfil all the other responsibilities expected of them. This proves to be even more challenging for newly appointed HoDs who are not yet able to manage their time effectively.

The aim of leadership development opportunities for aspiring and newly appointed HoDs should be to prepare HoDs to be well-rounded and adequately equipped to do their job. This leads to a discussion about which skills an HoD need to have and therefore need to be trained in. Strong similarities are evident between the literature,

the responsibilities of HoDs as set out in the Personnel Administrative Measures (PAM) and the recommendations which emerged from the data. Potgieter, Basson and Coetzee (2011) are of the opinion that an HoD needs certain skills in order to be effective in their role. According to Leithwood (2016) an HoD must demonstrate skills such as dedication, have an energetic approach, be considerate towards others and be well grounded individuals. These are all soft skills that can be gained through experience, one of the principles of Kolb's Experiential Learning Theory to grow and learn. However, on the other hand an HoD should also display extensive pedagogical knowledge, must have the ability to identify short term goals, and be proficient problem solvers and decision-makers (Saul, 2019). Responsibilities of HODs as indicated in the Personnel Administrative Measures (PAM) include skills and competencies that should be acquired through experience, such as guiding staff members to academic success, forming part of performance appraisals, as well as meeting with parents regarding learner progress (RSA, 2016). There are also skills contained in this policy that should be taught to aspiring and newly appointed HoDs such as policy and budget related matters, methods on evaluating assessments, setting up timetables and moderation. These are skills that should be taught and can be learnt by HoDs through formal professional development. The requirement for HoDs to only have a minimum of three years' experience as a Post Level 1 teacher is not enough experience for any teacher to gain the skill set and develop the competencies expected of an HoD. Aspiring HoDs should also be placed in certain roles as Post Level 1 teachers that will allow them to acquire skills by applying the principles of Kolb's Experiential Learning Theory in a controlled and non-volatile environment where expectations could be met.

Knowledge of the curriculum is one of the competencies that comes strongly recommended and is clearly stipulated in the expectations set out in the Personnel Administrative Measures (PAM). In order to lead a department to academic success an HoD needs in-depth knowledge regarding the curriculum and should be able to break it in to smaller sections in order for all staff members to understand and apply it correctly. Previous studies also underscored the importance of an HoD being a subject specialist and went as far as stating that an HoD's role was to take care of the core business of schooling which is teaching and learning (Bush *et al*, 2009) which boiled down to having adequate knowledge of the curriculum. HoDs therefore

need to be able to lead their department towards academic success. The PAM clearly states that an HoD should not only engage in teaching, assessing and recording of marks, but should also be involved in all syllabi related matters, setting out working schemes as well as promoting teaching and learning. To meet these requirements, HoDs should be formally trained not only through the means of workshops, but should be granted the opportunity to act in leadership positions such as grade head or subject head and manage issues on a smaller scale before being promoted to an HoD. The lack of adequate and effective training, as well as the inexperience of HoDs are two of the factors that prevent newly appointed HoDs from acquiring sufficient knowledge regarding the curriculum in order to have the required expertise. The minimum requirement of only three years' teaching experience to be appointed as an HoD adds to an already complicated dilemma.

Proper planning and thorough administrative skills are considered as two of the most essential tools an HoD needs. These are competencies that can only be partially taught and should also be developed and mastered through experience. Being an HoD is a dual role which not only includes the role of teacher but also that of an administrator (Saul, 2019). It is clearly prescribed in the Personnel Administrative Measures (PAM) that an HoD should manage and coordinate work schemes, stock, provisions, oversee reports, take responsibility for the setting of rosters, as well as all administrative responsibilities pertaining to staff members. These are only a few of the responsibilities that an HoD needs experience in to be able to properly execute the new role. Being competent in terms of administrative matters require not only an aptitude to think and plan strategically, but an HoD should also be someone with satisfactory experience in handling such matters.

The Personnel Administrative Measures (PAM) stipulate that HoDs should cooperate with colleagues to maintain good teaching standards which leads to the conclusion that an HoD needs good communication and interpersonal skills. HoDs have daily and direct contact with teachers as well as members of the senior management team and therefore need to be able to clearly convey themselves through the means of well-constructed and clear communication. This is supported by Saul (2019) who argued that HoDs need to be emotionally mature adults with high levels of emotional intelligence that will, as indicated in the PAM, enable them to meet with parents to discuss the welfare of learners. HoDs therefore need to be able to develop and

maintain relationships with parents, colleagues, learners and teachers. These are competencies that can to some extent be developed through training but rely mostly on prior experience to be developed fully. HoDs should be able to instil collective ownership and this can only be achieved where some form of situational based learning has taken place. These opportunities should be considered essential as they form the foundation that determines an HoD's success. HoDs with little to no experience in dealing with people will lack the ability to clearly communicate which may have a dramatic influence on the way they approach their work.

The workshops or courses that are presented by professional teaching bodies do not seem to have a significant impact on the learning opportunities of HoDs. The quality of these workshops is debatable and consensus regarding their value could not be established. One can thus conclude that such courses only serve to sharpen skills and allow reflection on own practices of aspiring or recently appointed HoDs, rather than teaching new skills or contributing towards leadership development.

The value of mentorship programmes to empower and prepare HoDs is one of the aspects that became very apparent in this study. It is a strategy that is used by most of the participating schools to assist recently appointed HoDs. Such mentorship programmes have a significant influence on the effectiveness of the participating HoDs and they greatly benefit from it with regards to preparing them for all the aspects of their work. The principle of mentorship enables an individual to form new knowledge based on experiences and contextual demands (Kolb & Kolb, 2009) and therefore adhere to the principles of Kolb's Experiential Learning Theory. With mentorship an individual is not left to their own devices or to work at their own pace, but is encouraged by a mentor who knows more and realises in which direction the individual needs to be driven. Participants who did not get the opportunity to learn from a mentor strongly encouraged schools to put a mentorship programme in place as it would help prepare aspiring HoDs to execute their responsibilities if they are to assume the position of HoD.

The data suggested that the use of distributed leadership practices within a department had mutually beneficial consequences. Distributed leadership has the potential to provide aspiring HoDs with the experience they need to contribute to their leadership development. It also lightens the workload of HoDs and senior management while simultaneously empowering aspiring school leaders. Distributive

leadership is deemed necessary to allow all role players in a school system to have sufficient leadership development opportunities and to contribute to effective teaching and learning (Botha & Triegaardt, 2014).

Although the Personnel Administrative Measures (PAM) stipulate what is expected of HoDs, there is an apparent need among HoDs for an additional written guide or manual that clearly sets out what is expected of them within their current school context. Because schools have different expectations regarding the role of an HoD due to their unique and varying contexts, such a guide will inform HoDs of what is specifically expected of them. Such a guide or manual should however be developed at each individual school.

It is required from HoDs to have certain competencies with regards to the use of information technology in respect of teaching and administration. There is also a need for HoDs to assist other teachers who do not have the necessary technological abilities to be relevant during the fourth industrial revolution.

5.3 SIGNIFICANCE OF THE STUDY

This study not only emphasised the importance of the role of the HoD but also gave significant insight into the leadership development of HoDs. The following additional questions arose through the analysis of the data:

- Do aspiring HoDs have enough opportunities to gain sufficient experience as Post Level 1 teachers that will enable them to be efficient HoDs?
- Do newly appointed HoDs have the necessary skills to fulfil their job requirements?
- Is the minimum requirement in years of experience to become an HoD sufficient?
- Do schools have programmes in place to support recently appointed HoDs?
- Are the HoDs in public schools given sufficient professional development opportunities?
- What is the role of formal training in the preparation of HoDs?

Even though some of these issues are not necessarily linked to the research questions that guided this study, these issues are deemed important aspects

regarding leadership development of HoDs in public schools. The study confirmed that HoDs are unprepared for their new role which emphasised the importance of leadership training of HoDs prior to them assuming the position.

The responsibilities and expectations of HoDs as set out in the Personnel Administrative Measures (PAM) clearly stipulate what can be expected of an HoD and should serve as a framework to determine in which aspects aspiring and recently appointed HoDs need to be trained. In addition, this study illuminates the perceptions and experiences of HoDs in their leadership development. The study further provides insights regarding the leadership development of entry level educational leaders which can assist the Department of Basic Education, professional teaching organisations and senior management teams of public schools in their leadership development programmes. The findings will also contribute to current literature on the leadership development of HoDs.

By closely examining the experiences of HoDs, the findings of this study helped to identify gaps in the leadership development journey of HoDs as well as flaws in the initiatives and programmes that are currently in place to help prepare HoDs with the transition from a Post Level 1 teacher to that of an HoD. These aspects can contribute to the preparation process of HoDs and encourage policy changes that will increase the focus on the leadership preparation of HoDs. The finding that HoDs are generally unprepared and unequipped for the role they undertake sheds light on the importance of having initiatives in place that adequately prepare HoDs as entry level educational leaders. This will also encourage education policy makers to reconsider the minimum requirements for being appointed as an HoD. This study revealed that the minimum requirement of three years' teaching experience before being appointed as an HoD is not adequate if a certain level of excellence is expected from such an individual.

The findings of this study brought the discrepancies in the workload of HoDs at different schools to light. Notwithstanding the prescriptions as contained in the Personnel Administrative Measures (PAM), the expectancies of what an HoD should be doing, differs greatly from school to school. This is further complicated by the varying number of HoDs that schools have, as schools are allocated HoD positions based on the number of learners enrolled at a specific school. This illustrates how the local context of a school can impact on the leadership role of an HoD.

This study also revealed that the discrepancies in the workload create ambiguity pertaining to the role of a HoD and that many HoDs do not know what exactly the job entails or what competencies they require to be successful. Because expectations and the way in which an HoD is utilized vary so greatly from school to school, aspiring and newly appointed HoDs need to be adaptable to the contextual uniqueness of the school at which they are appointed. This aspect needs to be included in the leadership development programmes of aspiring and newly appointed HoDs. If HoDs do not know what their jobs entail, they will not be able to execute tasks or be effective in their jobs. This issue substantiates already existing literature (Mårtensson & Roxå, 2016; Kosgei, 2015; Javadi, 2014) and therefore emphasises the magnitude of the challenge.

This study also brought to light the success and necessity of mentorship programmes as well as the value of distributed leadership. This contributes to the already existing literature which argues the effectiveness of distributed leadership (Botha & Triegaardt, 2014; Harris, 2004) and mentorship programmes (Snoek, 2014; Zhang & Brundrett, 2010). Findings in the study also suggest that distributed leadership does not only benefit the senior management of a school, but that it is essential for the leadership development of aspiring and recently appointed HoDs as it allows them to gain the experiences that will contribute to their effectiveness as an HoD. The findings regarding the success of mentorship programmes as well as the admittance to the need of such programmes by HoDs will also reinforce literature proposing mentorship in schools (Moorosi, 2014; NEEDU, 2013: 79), especially pertaining to leadership development of HoDs.

5.4 LIMITATIONS OF THE STUDY

Only eight HoDs participated in this research study and the data sets are only based on their individual experiences with regard to their own leadership development. This led to this study only relying on the subjective information given by a small number of participants who came from a very diverse range of backgrounds. In some instances this led to data being either very similar or very different from that obtained from other participants – not always allowing similar points of interest to be addressed due to vastly different experiences and backgrounds. In addition, the selection criteria of this study were specific, which made it difficult to find candidates that fit the criteria and who were willing to participate in this study.

5.5 RECOMMENDATIONS

A few issues emerged from this study with regards to the leadership development of HoDs. Keeping in mind that only a small number of participants were used in this study and generalisation should be avoided, I make the following recommendations that should be carefully considered.

Having established the importance of mentorship programmes in this study, it should be standard practice for newly appointed HoDs to be assigned a mentor when assuming the position for the first time. A mentor will not only guide them and help HoDs learn and grow through the process, but a mentor will also be able to avoid mistakes made due to inexperience. Mentorship programmes will benefit all stakeholders involved in a school system and will contribute immensely to the leadership development of HoDs.

With some of the participants feeling overwhelmed when first assuming the position of an HoD and being uncertain as to what is expected of them, an induction programme should be considered. This will contribute to newly appointed HoDs experiencing a smoother transition from being a Post Level 1 teacher to being an HoD. In addition, to ensure that HoDs are aware of what is expected of them, it should be compulsory for the senior management of public schools to have their own induction manual for aspiring and newly appointed HoDs. These manuals should contain a thorough job description that is specific to a particular HoD. All responsibilities and expectations of a specific HoD at his or her school should be clearly outlined in such a manual. When HoDs are aware of the expectations, efforts can be made to attain goals and thus be successful in executing their responsibilities.

In order to perform the core duties and responsibilities of HoDs, that are outlined in the Personnel Administrative Measures (PAM) (RSA, 2016), training and preparation to meet these expectations should have already been integrated into a leadership developmental programme before the appointment of a teacher as an HOD. Leadership development of HoDs can be divided into two categories, namely skills and competencies that can be taught through formal instructions and skills and competencies that can only be acquired through experience. Training sessions should be compulsory for newly appointed HoDs and must be attended on a regular

basis. These sessions should be presented by professional teaching bodies to ensure a high standard. These sessions should cover matters that require formal acquisition of knowledge such as curriculum matters, policies, aspects pertaining to the law, for example the South African Schools Act, as well as all matters pertaining to school financial management, for example budgeting. So-called soft skills such as interpersonal skills, communication skills, organisational and administrative competency and adaptability, are all skills that can be acquired through experiential learning. Aspiring HoDs should thus be given ample, relevant and appropriate experiences for so called 'on the job learning'. By making use of distributed leadership, leadership responsibility should be shared with aspiring HoDs for them to, over time, acquire the skills required of HoDs.

Lastly, the minimum requirement to be appointed as an HoD in the South African context should be revised. HoDs are only required to have three years teaching experience to assume the position as HoD. It was evident from this study that the role of an HoD has many facets and requires that an individual must be prepared to work hard, possess a certain skill and competency set, as well as having enough experience to cultivate a balanced approach to leading and managing people. Suggestions as stipulated in the NEEDU Report (2012) that aspiring HoDs should be subjected to competency tests to establish whether they are equipped for the task at hand is thus supported. HoDs play an important role in schools and all recommendations should be considered carefully to guarantee quality leadership and management in schools.

5.6 SUGGESTIONS FOR FURTHER RESEARCH

This was a study of limited scope with a small number of participants. A similar, but more comprehensive study with many more participants will generate more data on leadership development and experiences of aspiring and newly appointed HoDs which will permit more generalised findings.

This study focused on what is expected of HoDs in relation to what is stipulated in the Personnel Administrative Measures (PAM). More research involving a larger sampling group should be done to determine what the actual responsibilities and expectations of HoDs are to identify the leadership development needs of HoDs. Principals and deputy principals should also be included as participants in such a

study as they are often the ones who determine the specific job description of an HoD. Their experiences and perceptions will add value to the findings of this study and will contribute to a better understanding of what is expected from an HoD.

This study only focused on the leadership development of HoDs in fee-paying public primary schools in Pretoria. Similar studies should be done in other South African contexts, for example independent schools, non-fee-paying schools, township schools and rural schools, in order to identify similarities, differences and solutions pertaining to the leadership development of HoDs. In addition, it would be interesting to see the results of a comparative study which compared the leadership development of HoDs in independent schools with those in public schools. In this way best practices within these different contexts could be identified, which could influence leadership development of HoD's in particular and educational leaders in general.

One of the specifications of participant selection for this study was that the participants in this study should have four years or less experience as an HoD in order to ensure that their recollection of their experiences are relatively current. A similar study focusing on more experienced HoDs will enrich this study as conclusions can be drawn from such a study that will determine whether the challenges HoDs face are only experienced by newly appointed HoDs or if similar challenges are experienced by more experienced HoDs.

5.7 CONCLUDING REMARKS

The education sector is constantly changing (Kalargyrou, Pescosolido & Kalargiros, 2012) and with it the demands on and expectations of school leaders such as HoDs. This study emphasised the role of HoDs in schools and the importance of enabling and empowering them by exposing them to relevant and appropriate leadership development opportunities. Many HoDs are appointed due to being proficient teachers (Javadi, 2014), but they are not necessarily prepared for the management and leadership expectations of their new role which only extenuates the need for leadership development programmes.

Because the improvement of school leadership has shown to have a direct link to school improvement (Bush & Jackson, 2002), it is essential to ensure that all role players, including HoDs, have the support they need in terms of leadership

development to enable them to be educational leaders. However, it seems as if there is much room for improvement in the leadership development of school leaders in South Africa. This should urgently be addressed for South African schools to remain relevant in the 21st century.

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Addendum A – GDE permission form

GAUTENG PROVINCE

Department of Education

REPUBLIC OF SOUTH AFRICA

8/4/4/1/

GDE RESEARCH APPROVAL LETTER

Date:	09 October 2019
Validity of Research Approval:	10 February 2020 - 30 September 2020 2019/291
Name of Researcher:	Strydom W
Address of Researcher:	57 Univille 1144 Pierneef Street Villieria, 0186
Telephone Number:	012 941 2000/ 073 092 4767
Email address:	willemien@eduplex.co.za
Research Topic:	Leadership development of Head of Department in public schools.
Type of qualification	MEd (Educational Leadership)
Number and type of schools:	Nine Primary Schools
Districts/HO	Gauteng East, Gauteng West and Gauteng North

Re: Approval in Respect of Request to Conduct Research

This letter serves to indicate that approval is hereby granted to the above-mentioned researcher to proceed with research in respect of the study indicated above. The onus rests with the researcher to negotiate appropriate and relevant time schedules with the school/s and/or offices involved to conduct the research. A separate copy of this letter must be presented to both the School (the principal and SGB) and the

District/Head Office Senior Manager confirming that permission has been granted for the research to be conducted.

The following conditions apply to GDE research. The researcher may proceed with the above study subject to the conditions listed below being met. Approval may be withdrawn should any of the conditions listed below be flouted

Making Education a societal priority

Office of the Director: Education Research and Knowledge Management

7th Floor, 17 Simmonds Street, Johannesburg, 2001

Tel: (011) 355 0488 Email: Faith.Tshabalala@gauteng.gov.za

Website: www.education.gpg.go.za

1. *Letter that would indicate that the said researcher/s has/have been granted permission from the Gauteng Department of Education to conduct the research study.*
2. *The District/Head Office Senior Manager/s must be approached separately, and in writing, for permission to involve District/Head Office Officials in the project.*
3. *A copy of this letter must be forwarded to the school principal and the chairperson of the School Governing Body (SGB) that would indicate that the researcher/s have been granted permission from the Gauteng Department of Education to conduct the research study.*
4. *A letter/ document that outline the purpose of the research and the anticipated outcomes of such research must be made available to the principals, SGBs and District/Head Office Senior Managers of the schools and districts/offices concerned, respectively.*
5. *The Researcher will make every effort obtain the goodwill and co-operation of all the GDE officials, principals, and chairpersons of the SGBs, teachers and learners involved. Persons who offer their co-operation will not receive additional remuneration from the Department while those that opt not to participate will not be penalised in any way.*
6. *Research may only be conducted after school hours so that the normal school programme is not interrupted. The Principal (if at a school) and/or Director (if at a district/head office) must be consulted about an appropriate time when the researcher/s may carry out their research at the sites that they manage.*
7. *Research may only commence from the second week of February and must be concluded before the beginning of the last quarter of the academic year. If incomplete, an amended Research Approval letter may be requested to conduct research in the following year.*
8. *Items 6 and 7 will not apply to any research effort being undertaken on behalf of the GDE. Such research will have been commissioned and be paid for by the Gauteng Department of Education.*
9. *It is the researcher's responsibility to obtain written parental consent of all learners that are expected to participate in the study.*
10. *The researcher is responsible for supplying and utilising his/her own research resources, such as stationery, photocopies, transport, faxes and telephones and should not depend on the goodwill of the institutions and/or the offices visited for supplying such resources.*
11. *The names of the GDE officials, schools, principals, parents, teachers and learners that participate in the study may not appear in the research report without the written consent of each of these individuals and/or organisations.*
12. *On completion of the study the researcher/s must supply the Director: Knowledge Management & Research with one Hard Cover bound and an electronic copy of the research.*

13. *The researcher may be expected to provide short presentations on the purpose, findings and recommendations of his/her research to both GDE officials and the schools concerned.*
14. *Should the researcher have been involved with research at a school and/or a district/head office level, the Director concerned must also be supplied with a brief summary of the purpose, findings and recommendations of the research study.*

The Gauteng Department of Education wishes you well in this important undertaking and looks forward to

Kind regards,



.....
examining the findings of **your** research **study**.

Mr Gumani Mukatuni

Acting CES: Education Research and Knowledge Management

DATE: 10/10/2019.....

2

Making education a societal priority

Office of the Director: Education Research and Knowledge Management

7th Floor, 17 Simmonds Street, Johannesburg, 2001 Tel: (011) 355 0488

Email: Faith.Tshabalala@gautengov.za

Addendum B – Participant permission form

Letter of informed consent: Research participant - HOD

Dear Mr/Mrs

PARTICIPATION IN THE STUDY: “*Leadership development of Heads of Department in public primary schools.*”

I am currently enrolled for an MEd degree in Education Management, Law and Policy at the University of Pretoria. Part of the requirements for the awarding of this degree is the successful completion of a significant research project in the field of Education.

I consider it a privilege and a great honour to invite you to become a voluntary participant in this research project. The title of my approved research study is:

“Leadership development of Heads of Department in public primary schools”.

This study will be conducted at approximately 8 Primary schools situated in Pretoria and within the jurisdiction of the Gauteng Department of Education.

The purpose of this study is to investigate what leadership development programmes or initiatives schools have in place to develop aspiring HODs and to determine how these programmes and initiatives are perceived by aspiring HODs. It is my intention to gather the information I require for this study project as follows:

As part of this research, I need to conduct interviews with newly (within the previous 3 years) appointed HODs within the chosen 8 schools. Selected participants must be working in those schools selected as an HOD prior to, or during, this research. As a participant in this project, your role will be to respond to a set of interview questions. Participants may also ask questions to clarify any issue concerning the interview or a matter that may arise during the interview.

As a participant, you will not be asked to reveal information that will allow your identity or that of your school to be known. Neither you as an individual, or your school will be identified by any means in the research report. Pseudonyms may be

used where necessary. To ensure that you are comfortable with the information you give, you will be provided with a confidential electronic or written transcript of your own interview and will have final approval of both its accuracy and its content. Follow-up interviews might be required to clarify some matters, but this will also be voluntary and in line with the confidentiality agreements. I have included herewith, for your information, a schedule of the interview questions as part of the information gathering process. I will make an arrangement to interview you after school hours at a venue that is convenient for you.

Please be assured that all the data collected from this study will be kept strictly confidential, with not even the Department of Education having access to the raw data obtained from the interviews. The data collected will be used for research purposes only. Furthermore, if you decide to participate in this study, you have the right to withdraw at any time during the research process without any penalty. Please understand that participation is entirely voluntary. Once you have indicated your willingness to participate, permission for your participation will also be secured from the Gauteng Department of Education.

We would also like to request your permission to use your data for further research purposes, as the data sets will be the intellectual property of the University of Pretoria. Further research may include secondary data analysis and using the data for teaching purposes. The confidentiality and privacy agreement applicable to this study will be binding on any future research studies involving your data.

At the end of the research study you will be provided with a copy of the research report containing both the findings of the study and recommendations on how leadership development of HoDs might be altered to be more effective. I will also be willing, at your request, to present the findings of the study to you. Please take note that no interaction with any of the learners of your school will take place for the purpose of this research project. The research study presents a unique opportunity for you to get involved in the process of research to investigate the preparation processes in place for aspiring Heads of Departments.

Thank you for taking the time to read this information. Kindly indicate if you are willing to participate in this research study, by completing the consent form at the end of this letter.

Yours sincerely,

Willemien Strydom

Student Researcher

Dr André du Plessis

Supervisor

PERMISSION FOR RESEARCH

I, _____, hereby give permission to Willemien Strydom to include me as a participant in her research on ***Leadership development of Heads of Department in public primary schools.***

Signature: _____ Date: _____

Addendum C – Interview protocol

Leadership development of Heads of Department in public primary schools

Research Question:

What are the leadership development experiences of recently appointed Heads of Department (HODs) in public primary schools?

Sub-questions:

The main research question above is complemented by the following sub-questions:

- What learning opportunities are provided to aspiring and newly appointed HoDs in public primary schools?
- What challenges do aspiring and newly appointed HoDs face in public primary schools?
- What competencies do newly appointed HoDs need to acquire in order to overcome the challenges they experience?

Interview Schedule:

- Please remember that your answer to all of these questions will be treated in the strictest confidence and that at no time will I allow you or your school to be identified either by name or by implication by any reader of the findings if this research.
- Please confirm the following basic biographical information about your school:
 - the quintile within which each school falls:
 - the school's geographical location:
 - the number of learners enrolled:
 - the number of staff members employed at your school:
 - the number of HoDs in your department
- Please confirm the following basic biographical information about yourself:
 - years of experience in education
 - years of experience as a Head of Department

- years you been working at the school where you are currently employed
- Name some of the biggest challenges you faced as an aspiring HoD.
- What skills do you think a HoD needs to possess to successfully conduct his/her job?
- What were your biggest challenges when you first assumed the position of a HoD?
- A). Where there any **intentional** training/courses/hands on experiences you had to undergo in preparation before assuming the position as HoD? Elaborate.
B). Was there any of these experiences that contributed to your effectiveness as an HoD? Explain.
C). Was there any of these experiences that did not at all contributed to your effectiveness as an HoD? Explain.
- Looking back –to when you were a teacher – where there any incidental training / development /experiences that gave you the ability to be able conduct your responsibilities as a HoD? Elaborate.
- What structures are currently in place in your school that enables aspiring HoDs to develop as educational leaders?
- What structures are currently in place in your school that enables you to develop further as a HoD?
- In an ideal world – keeping your experience in mind – what preparation does aspiring HoDs need to undergo that will enable them to be efficient in their jobs?
- What is the one thing you learnt through your own experiences that made you an efficient HoD?
- Do you think that there is something that can prepare someone for the jump from teacher to HoD. If so – please elaborate.
- Are you currently intentionally doing something that might be preparing aspiring HoDs on your staff to become HoDs someday? Provide details.

- Who played the most significant role in your leadership and management development and why?

Addendum D – Principal and School Governing Body permission form

LETTER TO PRINCIPAL / LETTER TO THE SCHOOL GOVERNING BODY

The Principal / The school Governing Body

(Schools name) / (Chairperson`s name)

Dear Mr /Mrs.....

PARTICIPATION IN THE STUDY: “Leadership development of Heads of Department in public primary schools.”

I am currently enrolled for a Master’s degree in Education Management, Law and Policy at the University of Pretoria. Part of the requirements for the awarding of this degree is the successful completion of a significant research project in the field of Education. Educational leaders have an immense impact on learner outcomes and the success of any school. It is therefore important to investigate what leadership preparation Heads of Department undergo in order to be effective managers and leaders.

The title of my approved research study is “**Leadership development of Heads of Department in public primary schools.**” This study will be conducted at 8 primary schools situated within the jurisdiction of the Gauteng Department of Education.

My project is supervised by Dr André du Plessis who is a lecturer at the University of Pretoria. The Department of Education has approved my research and a copy of the approval letter is attached to this document. The study has also been approved by the Ethics Committee of the Faculty of Education of the University of Pretoria and has been given the reference number EDU087/19.

The purpose of this letter is to request that you kindly grant me permission to invite educators in your school to participate in this study. The purpose of this study is to investigate what leadership development programmes or initiatives schools have in place to develop aspiring HODs, and to determine how these programmes and initiatives are perceived by aspiring HODs. The data will be collected through audio-recorded interviews and document analysis. Each interview should take less than an hour. Only educators who have given their consent will participate in this study. Data collected from this study will be kept strictly confidential, and neither the school nor

the participants will be identifiable in any report. The data collected will be used for research purposes only. The educators who are participating may withdraw at any time during the research process without any penalty.

We would also like to request your permission to use your data for further research purposes, as the data sets will be the intellectual property of the University of Pretoria. Further research may include secondary data analysis and using the data for teaching purposes. The confidentiality and privacy agreement applicable to this study will be binding on any future research studies involving your data.

Educators identified to participate in this study will only be approached after you have given your approval for this study to be conducted at your school. At such a time, informed consent will be obtained from participating educators, and a date and time (after hours) will be arranged for data collection.

The findings of this study could be useful to Education practitioners in future. The research study has the potential to provide insight into how leadership development programmes can be enhanced in order to prepare the educational leaders of the future. The research study presents a unique opportunity for you to get involved in research that investigates the current situation experienced by heads of department in your immediate vicinity. This will include their views on leadership development of heads of department.

If you are willing to participate in this study, please sign this letter as a declaration of your consent. Consent implies that you are willing to participate in this project willingly and that you understand that you may withdraw from the project at any time. I assure you that under no circumstances will the identity of the interviewees be made known to district or provincial officials or their representatives.

Thank you for taking the time to read this information.

Participant

Signature

Date

Researcher

Signature

Date

Yours in service of Education,

Willemien Strydom

Student Researcher

Dr André du Plessis

Supervisor