



**Exploring the role of Foundation Phase Heads of Department as  
instructional leaders in three primary schools in Gauteng:  
Implications for teaching and learning**

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## **DECLARATION**

I, Cheryl Jugdav, declare that this research topic is my own unaided work. All sources I used have been indicated and acknowledged by means of complete references through the required referencing conventions. The research has been submitted exclusively in partial fulfilment of the requirements for the degree of Master of Education from the University of Witwatersrand, Johannesburg. It has not been submitted before for any other degree or examination in any other university.

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Date of submission: \_\_\_\_\_

## **DEDICATION**

This work is dedicated to my children, Rivash and Sasha Jugdav for their undying love and support throughout my two years of study. Without your constant motivation and encouragement during a difficult period, this research report would not have come to fruition.

I am eternally grateful to Almighty God, for guiding and providing me with the strength, perseverance and wisdom to complete such a painstaking task while working at a full time job. Without divine intervention this arduous task would be impossible.

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I hold you all dearly within my heart forever!

## GLOSSARY OF TERMS AND ABBREVIATIONS

|         |                                                                        |
|---------|------------------------------------------------------------------------|
| ACE     | Advanced Certificate in Education                                      |
| ANA     | Annual National Assessments                                            |
| CAPS    | Curriculum and Assessment Policy Statement                             |
| DoE     | Department of Education                                                |
| DP      | Deputy Principal                                                       |
| FP      | Foundation Phase                                                       |
| GDE     | Gauteng Department of Education                                        |
| HoD     | Head of Department                                                     |
| IL      | Instructional Leadership                                               |
| IQMS    | Integrated Quality Management System                                   |
| LOLT    | Language of Learning and Teaching                                      |
| NAPTOSA | National Professional Teachers Organisation of South Africa            |
| NCSL    | National Council for School Leadership                                 |
| NEEDU   | National Education Evaluation and Development Unit                     |
| PAM     | Personal Administrative Measures                                       |
| SGB     | School Governing Body                                                  |
| SMT     | School Management Team                                                 |
| SACMEQ  | Southern and East Africa Consortium for Monitoring Educational Quality |
| SADTU   | South African Democratic Teacher's Union                               |
| SASP    | South African Standards for School Principals                          |
| TIMMS   | Trends in International Mathematics and Science Study                  |

## **ABSTRACT**

As the quality of leadership makes an outstanding difference to school and learner outcomes, the purpose of this study is to explore the roles and responsibilities of the Foundation Phase (F.P.) Head of Department (HoD) as instructional leader and show how their leadership practices shape effective teaching and learning in three primary schools in Gauteng. Research has shown that schools require effective leaders and managers to provide the best possible education for learners and staff but this is clearly lacking in many schools today. Much research done on this topic has mainly focussed on the principal as instructional leader rather than the HoD who forms the main rationale for the study.

This research explores the F. P. HoD (middle manager) and the roles they play as instructional leaders in promoting successful learner achievement in primary schools. A qualitative research method was employed to assess the perceptions of principals, HoDs and teachers in three schools in Johannesburg, South Africa. This study reports on the understanding and views of the participants as they perceive the role of the HoD as instructional leader and the implications of this for teaching and learning in the F.P.

The study is positioned within a qualitative research approach. Face-to-face interviews were conducted with principals and HoDs in the schools. The Atlas. ti software programme was used to analyse the data extracted using codes and themes. Open-ended questionnaires were administered to teachers in the schools and the data was first transcribed and then analysed using Thematic Analysis. This involved identifying common themes, codes and patterns within the data. The study uses the perceptions of the participants to draw conclusions to the research questions. In the findings, the participants' responses demonstrated that when HoDs are directly involved with leading and managing the instructional programme in the F. P. it led to the improvement of learner performance and school results. The key questions are answered in the analysis and findings of the report. The participants in the study highlighted the challenges HoDs faced which hindered their roles as instructional leaders. Some of the challenges encountered by HoDs were the heavy workload, class teaching and lack of support from the District Office regarding curriculum delivery. Findings from the data analysed, show that HoDs play a crucial role in leading and managing the instructional programme to affect improved learner performance. This study shows that the success of schools is based on the effective instructional role of the HoD and how this leads to improved learner achievement and school performance.

**Keywords:** Instructional leadership, teaching and learning, middle managers, role, principal, responsibilities, effective, monitoring and evaluation, shared, distributed, leadership, head of department, implications

## **TABLE OF CONTENTS**

|                                           |      |
|-------------------------------------------|------|
| Copyright Notice .....                    | i    |
| Declaration .....                         | ii   |
| Dedication.....                           | iii  |
| Acknowledgements .....                    | iv   |
| Glossary of terms and abbreviations ..... | v    |
| Abstract.....                             | vi   |
| Table of Contents .....                   | viii |

## **CHAPTER 1: INTRODUCTION AND BACKGROUND**

|                                                |    |
|------------------------------------------------|----|
| 1. Introduction .....                          | 1  |
| 1.1. Background of the Study .....             | 2  |
| 1.2. Statement of the Problem .....            | 3  |
| 1.3. Research Questions .....                  | 4  |
| 1.4. Clarification of Concepts .....           | 5  |
| 1.5. Aims and Objectives of the Study.....     | 6  |
| 1.6. Purpose and Rationale for the Study ..... | 7  |
| 1.7. Significance of the Study .....           | 8  |
| 1.8. Overview of the Research Methodology..... | 9  |
| 1.9. Summary of Chapters.....                  | 10 |

## **CHAPTER 2: LITERATURE REVIEW**

|                       |    |
|-----------------------|----|
| 2. Introduction ..... | 11 |
|-----------------------|----|

|        |                                                                               |    |
|--------|-------------------------------------------------------------------------------|----|
| 2.1.   | Notions of the Foundation Phase .....                                         | 12 |
| 2.2.   | Conceptual and Theoretical Framework .....                                    | 12 |
| 2.3.   | Defining Leadership .....                                                     | 13 |
| 2.4.   | Contrasting Leadership and Management .....                                   | 14 |
| 2.5.   | The Concept of Instructional Leadership Defined .....                         | 15 |
| 2.6.   | Models of Instructional Leadership .....                                      | 17 |
| 2.6.1. | Hallinger and Murphy's Model of Instructional Leadership .....                | 17 |
| 2.7.   | Defining Instructional Leadership .....                                       | 19 |
| 2.8.   | The Changing face of Instructional Leadership .....                           | 23 |
| 2.9.   | The HoD as Instructional Leader .....                                         | 23 |
| 2.10.  | Roles and Responsibilities of the Foundation Phase HoD .....                  | 25 |
| 2.11.  | The Significance and Importance of Instructional Leadership .....             | 26 |
| 2.12.  | Managing Teaching and Learning in South African Schools .....                 | 28 |
| 2.13.  | Challenges faced by HoDs in Implementing Instructional Leadership .....       | 30 |
| 2.14.  | Gaps in understanding the role of the instructional leader at F.P. level..... | 31 |
| 2.15.  | Conclusion .....                                                              | 33 |

### **CHAPTER 3: RESEARCH DESIGN AND METHODOLOGY**

|        |                               |    |
|--------|-------------------------------|----|
| 3.     | Introduction .....            | 34 |
| 3.1.   | Paradigms in Research .....   | 34 |
| 3.1.1. | Positivism Paradigm .....     | 34 |
| 3.1.2. | Interpretive Paradigm .....   | 35 |
| 3.1.3. | Critical Realism Theory ..... | 35 |

|        |                                                 |    |
|--------|-------------------------------------------------|----|
| 3.2.   | Methodology .....                               | 36 |
| 3.2.1. | Adopted Research Paradigm .....                 | 36 |
| 3.2.2. | Qualitative Research Design .....               | 36 |
| 3.2.3. | Sampling Technique .....                        | 37 |
| 3.2.4. | Sources of data .....                           | 38 |
| 3.2.5. | Data Collection Strategies .....                | 39 |
| 3.2.6. | In-depth Interviews .....                       | 39 |
| 3.2.7. | Questionnaires .....                            | 40 |
| 3.2.8. | Audio-tape Recording .....                      | 40 |
| 3.2.9. | Credibility and Reliability .....               | 40 |
| 3.10.  | Data Analysis .....                             | 41 |
| 3.11.  | Ethical Considerations.....                     | 42 |
| 3.12.  | Researcher Positionality and Bias Control ..... | 44 |
| 3.13.  | Pilot Study .....                               | 45 |
| 3.14.  | Conclusion .....                                | 46 |

#### **Chapter 4: DATA PRESENTATION AND ANALYSIS**

|      |                                                                         |    |
|------|-------------------------------------------------------------------------|----|
| 4.   | Introduction .....                                                      | 47 |
| 4.1. | Theory that underpinned the analysis decision .....                     | 47 |
| 4.2. | The Interviews – Principals 1, 2 and 3 School 1, 2 and 3 .....          | 48 |
| 4.3. | The Interviews – Heads of Department 1, 2 and 3 School 1, 2 and 3 ..... | 54 |
| 4.4. | The Questionnaires – Teachers – School 1, 2 and 3 .....                 | 59 |

|        |                                                           |    |
|--------|-----------------------------------------------------------|----|
| 4.5.   | Challenges faced by HoDs that hinder their teaching ..... | 64 |
| 4.5.1. | Challenges faced by HoDs – Principals perspectives .....  | 65 |
| 4.5.2. | Challenges faced by HoDs – HoDs perspectives .....        | 68 |
| 4.5.3. | Challenges faced by HoDs – Teacher’s perspectives .....   | 69 |
| 4.6.   | Conclusion .....                                          | 70 |

## **CHAPTER 5: FINDINGS, DISCUSSION AND IMPLICATIONS**

|        |                                                                |    |
|--------|----------------------------------------------------------------|----|
| 5.     | Introduction.....                                              | 71 |
| 5.1.   | Reflective overview of the Study .....                         | 71 |
| 5.2.   | Limitations of the Study .....                                 | 72 |
| 5.3.   | Discussion of Findings .....                                   | 73 |
| 5.3.1. | Conclusions for Research Questions .....                       | 73 |
| 5.3.2. | Sub- Research Question 1 .....                                 | 73 |
| 5.3.3. | Sub – Research Question 2 .....                                | 73 |
| 5.3.4. | Sub – Research Question 3 .....                                | 76 |
| 5.3.5. | Sub- Research Question 4 .....                                 | 77 |
| 5.3.6. | Main Research Question .....                                   | 77 |
| 5.4.   | What else could have been done in this study in hindsight..... | 78 |
| 5.5.   | Conclusion .....                                               | 78 |

## **CHAPTER 6: SUMMARY, IMPLICATIONS, RECOMMENDATIONS AND CONCLUSION**

|    |                    |    |
|----|--------------------|----|
| 6. | Introduction ..... | 80 |
|----|--------------------|----|

|        |                                                                         |    |
|--------|-------------------------------------------------------------------------|----|
| 6.1.   | Summary of the Study .....                                              | 80 |
| 6.2.   | Implications of the Study for Theory .....                              | 80 |
| 6.3.   | Implications of the Study for Practice.....                             | 81 |
| 6.4.   | Recommendations .....                                                   | 82 |
| 6.5.   | Areas for further Research .....                                        | 83 |
| 6.6.   | Contribution of the Study .....                                         | 83 |
| 6.7.   | Diagrammatic Representation of Instructional Leadership behaviours..... | 84 |
| 6.7.1. | Model A: Instructional leadership behaviours in School 1 .....          | 84 |
| 6.7.2. | Model B: Instructional leadership behaviours in School 2 .....          | 85 |
| 6.7.2. | Model C: Instructional leadership behaviours in School 3 .....          | 86 |
| 6.8.   | Conclusion.....                                                         | 87 |

|                  |    |
|------------------|----|
| REFERENCES ..... | 88 |
|------------------|----|

## Appendices

|                                                                   |     |
|-------------------------------------------------------------------|-----|
| Appendix A: Ethics Clearance Letter .....                         | 100 |
| Appendix B: GDE Research Approval Letter .....                    | 101 |
| Appendix C: Letter to the Principal, HoD, Teachers .....          | 103 |
| Appendix D: Information Letter to Participants .....              | 106 |
| Appendix E: Consent Letters to Participants .....                 | 109 |
| Appendix F: Principal's Semi-structured Interview Questions ..... | 112 |
| Appendix G: HoDs Semi-structured Interview Questions .....        | 113 |
| Appendix H: Teacher Questionnaire .....                           | 115 |
| Appendix I: Principals Atlas ti Reports .....                     | 117 |

|                                        |     |
|----------------------------------------|-----|
| Appendix J: HoD Atlas ti Reports ..... | 120 |
| Appendix K: Editors Letter .....       | 124 |

## **CHAPTER 1: INTRODUCTION AND ORIENTATION TO THE STUDY**

### **1. Introduction**

Teaching and learning in the Foundation Phase (F. P.) is extremely important and the significance of leadership and management in enhancing classroom practice and improving learner outcomes is increasingly a problem in many South African schools today. Heads of Department (HoDs) often referred to as ‘middle managers’ (Blandford, 1997 & Crowther & McLendon, 1998) are the first and foremost supervisors for teachers in their respective phases, yet many struggle to fulfil their teaching and management roles and responsibilities adequately. This situation presents a challenge for the leadership and management of the curriculum and affects the teaching and learning process. The F.P. provides the building blocks of a child’s schooling career and the basic unit on which future knowledge is gained, yet many of our learners right to quality education is highly compromised at this level.

It is recognised, internationally and in South Africa (Bush, 2010, Christie, 2001 & Taylor, 2008), that managing teaching and learning is one of the most important tasks for school leaders. Drawing on current literature studies, and using three schools, this study will show that leading and managing the educational programme is one of the main roles of instructional leaders which should influence and create a culture of teaching and learning in the F. P. (Bush, 2010). Therefore this study investigates the role, importance and effectiveness of the F. P. HoD as an instructional leader in contributing positively towards teaching and learning so that successful outcomes can be achieved.

The trend of recognising that leadership practice takes place in schools and is specifically crucial for classroom achievement cannot be overly emphasised. Instructional leadership relates to the core task of schools, whereby leaders promote and develop teaching and learning. The focus is on the HoDs behaviour and role in working with learners and how this action leads to the effective delivery of the curriculum. As the Annual National Assessments (ANAs) and Common Exams are always a cause of concern, the influence of the leader’s role, particularly that of the HoD in relation to learner performance is an area that requires further study. With the introduction of the Curriculum and Assessment

Policy Statement (CAPS) now more than ever before, HoDs play a leading role in its implementation and delivery in the classroom so that learners are receiving the best possible outcomes to ensure a successful learning experience. This study explores the significant role of instructional leadership and shows that HoDs who employ this concept help to build a culture of democratic teaching and learning in their schools.

The study investigates the existing conditions that prevail in schools and discusses what really good instructional leaders do to improve teaching and learning and how these actions could lead to school improvement and learner achievement. In concluding the research study the challenges faced by F. P. HoDs are outlined to highlight the difficulties they face in trying to implement the curriculum effectively.

### **1.1. Background to the study**

Current research into the state of education in our primary schools shows that many of our F. P. learners are unable to read fluently, write well-constructed sentences or count with speed and accuracy. Researchers Mestry (2017) and Hoadley (2008) agree that primary schools across the country are in need of improvement. Moreover, the recent Annual National Assessment (ANA) results have shown low levels of performance of learners in many schools in Gauteng. Learners lack the proper foundational knowledge and skills required and struggle to progress in the educational system (Bush, 2009).

The poor results confirmed in international and local surveys show that South African Grade 3 learners were ranked very low and their performance was cited as a symptom of a dysfunctional educational system (Maringe & Prew, 2014). The low levels of performance in English and Maths skills in the F. P. are concerning because these critical skills are fundamental to attaining success in further education and training. According to Spaul (2013), South Africa lags behind in cognitive skills and learning achievement. In the F. P. the ANA results and other systemic assessments serve as important indicators of classifying schools as performing or underperforming. As a consequence of this measurement system used by the Department of Education (DoE), school leaders are accountable for learner's poor performance due to their responsibilities as managers and leaders of the school curriculum.

Taylor (2008) asserts that if schools are to succeed they need to direct attention to instructional leadership practices that focus on teaching and learning in the classroom. Central to this, is the concept of instructional leadership in which the role of the HoD, deputy principal and principal of the school are crucial in building conditions which make it possible to, develop a culture where teaching and learning are discussed and valued and forms part of everyday curriculum activities. This study is important as it outlines the impact of implementing instructional leadership practices and emphasises how this concept, provided it is enacted properly is able to improve learner outcomes and school performance (Blasé & Phillips, 2010).

## **1.2. Statement of the Problem**

The problem in the current education system is the poor results of our learners as compared to many developing countries around the world. According to Taylor (2008) children in South Africa receive education of a low quality. What is not clear is how to improve the quality of schooling. The large amount of money spent on education since 1994 has not changed this situation. Researchers Taylor (2008), Bush (2005) and Christie (2001) indicate that there are weaknesses at all levels in the schooling system, from the classroom to the school and administrative structures that together contribute to this failure. Current research studies do not address these issues which are further exacerbated by the poor leadership that prevails in our schools. However, it is asserted by Mestry (2017), Bush (2013) and Christie (2010) that strong leadership on many different levels can make a difference in learners learning and schools performance.

In South Africa, the DoE (Newsletter, 2011) rates schools based on their learner performance in standardised tests and exams. Schools that achieve within the benchmark are classified as high performing and those that achieve below are termed under-performing/priority schools. Strong leadership has been cited as an important factor in the successful performance of schools and research suggests that the concept of instructional leadership can help to improve the performance of both teachers and learners (Bush, 2007). This leadership approach has been suggested as a possible element for the improvement of student learning (Blasé & Phillips, 2010). This places emphasis on the HoD who is caught between the complex and conflicting roles they play in the school (Beerens, 2000). The switching of roles and lines of accountability between the various

tasks they are expected to perform poses many challenges for them. Therefore, many overlook their main instructional leadership roles and focus more on managerial tasks (Goslin, 2009). Due to this confusion and lack of knowledge about their roles, HoDs neglect their primary function of leading and managing teaching and learning in their phase (Kruger, 2003). Reflecting on these findings, the following research questions were compiled:

### **1.3. Research Questions**

This research study was guided and encapsulated by the main question and sub-questions:

#### **Main Question:**

- What are the main instructional roles of the HoD and how does this impact on the culture of teaching and learning in the F. P.?

#### **Sub – Questions:**

1. How the notion of instructional leadership is conceptualised and defined by staff in three primary schools?

This entails gaining the perceptions from staff at different levels in three primary schools. The purpose is to explore their ideas of instructional leadership as a concept for school improvement.

2. What are the main roles and responsibilities of HoDs as instructional leaders in promoting an effective culture of teaching and learning in the F. P.?

In order to establish the main roles of the HoD, the research study will engage with the literature reviewed as well as the responses from the various participants in the study.

3. To investigate how the implementation of instructional leadership practices impact/influence teaching and learning in the F.P.?

From the data collected I will attempt to answer this question and by using the actual words of the participants in the study the research will draw conclusions based on this evidence.

4. To outline the challenges HoDs experience in providing effective leadership and management of teaching and learning and how they respond to it?

The data gathered from the HoDs will provide specific information about the challenges they experience as they try to implement instructional leadership practices. This study will be based on the HoDs role as instructional leaders, as principals do not normally work directly with learners in the classroom environment. Therefore the HoD as middle manager in the F. P. is responsible for this role. However, HoDs are often not sure of what their roles and responsibilities are and how to ensure that educators are actually enhancing teaching and learning in the classroom. This study will attempt to show the relationship between instructional leadership and successful school performance.

#### **1.4. Clarification of concepts**

**The following core concepts will be mentioned throughout the study:**

##### **Heads of Department (HoDs)**

Also known as middle managers, HoDs are in charge of their phases. The F. P. HoD is responsible for monitoring and controlling teaching and learning of Grade R – 3 learners. They play a dual role in the school, a teaching role and a supervisory role. Their functions and duties are spread widely over their department as they provide assistance to teachers, are administrators, liaise with the principal and staff to provide instructional guidance, organise, coordinate, delegate and control the activities in the department (Ghavifekr & Ibrahim, 2014) as stipulated by the Department of Education in the PAM document of 2016.

The HoDs in all phases are expected to perform administrative duties, and are expected to help or assist with non-teaching administrative duties like collection of fees, staff welfare, acting on behalf of the principal if the school does not have a deputy principal or do not qualify for one. All the above mentioned duties are expected to be done by all HoDs including those in the foundation phase (PAM, 2016).

## **Teaching and Learning**

Teaching refers to the actions of someone who tries to help others achieve their full potential in all areas of growth and development (Moore, 2014). Learning is a process whereby learners acquire knowledge and skills in an educational environment (Tobias & Duffy, 2009).

## **Instructional Leadership**

Instructional leadership is described as the actions that school leaders adopt to promote growth in learners learning. This behaviour involves educating all learners to high levels of achievement (Mestry, 2017).

To answer these research questions, the following aims and objectives were composed:

### **1.5. Aim and Objectives of the study**

#### **Aim:**

The primary aim of this study is to explore the instructional roles and responsibilities of the HoD and investigate its implications for teaching and learning in the F. P. In order to understand the general aim of the study, the following objectives are presented:

#### **Objectives:**

- To emphasise what really good instructional leaders do daily to improve teaching and learning and the effects of their behaviour on teacher's performance in the classroom.
- To explore the roles and responsibilities of F. P. HoDs as instructional leaders using the perceptions of principals, HoDs and teachers.
- To highlight the challenges faced by F. P. HoDs which hinder their instructional leadership practices in their schools?
- To provide guidelines or recommendations to assist HoDs to improve their instructional leadership roles.

## **1.6. Purpose and Rationale for the Study**

This study was prompted by the challenges, demands and complexities that relate to the role of HoDs as leaders and managers of the curriculum, supervisors of teachers and learners and senior role players in schools. As the F. P. HoD is responsible and accountable for the quality of work produced in the phase, this study aims to address the instructional role they play and how this will influence the teaching and learning process. Research within the role of the HoD in the F. P. as instructional leader appears to be minimal and this study could serve as a starting point to further debates on this crucially under researched topic. Many HoDs lack the proper pedagogical knowledge to implement, control and monitor the curriculum and this may impact negatively on their roles as instructional experts. HoDs are appointed to their positions on the basis of their service as teachers and move up into promotion posts without proper training and professional development to assist them to perform their duties as architects of curriculum implementation and delivery in their schools. This study is important as it intends to provide information on how F. P. HoDs can use their positions as instructional leaders to improve learner results.

Moreover, this study is important and relevant to all South African, primary schools as it provides information for HoDs as instructional leaders who are trying to make a difference in improving teaching and learning. As the F. P. is the early development phase of the schooling system, it requires teachers and HoDs to work together to support teaching and learning so that learners can proceed successfully to the next three phases of their schooling. This study is partly informed by many years of experience as a F. P. HoD, as well as by research that has been conducted on the work of principals as instructional leaders and how they are an important factor in changing teacher and learner behaviours to produce successful outcomes (Blasé & Phillips, 2010, & Bush, 2013).

Research studies on HoDs show that they are faced with challenging and demanding expectations with the implementation and monitoring of the curriculum in their school environments. HoDs are also not clear about their roles as instructional leaders and the support structures that are needed to effectively implement the curriculum. In addition to this, Naicker, Chikoko and Mthiyane (2013) recommend that further research be conducted to discover whether sufficient support is being provided to new educators and

HoDs. Researchers Zepeda and Kruskamp (2007) recommend that more studies be done to understand, support and nurture the work of department chairs. Further claims made by Poopedi (2012) that leadership and management be studied to improve the difficulties faced in leading and managing schools due to the various contexts that they exist in.

### **1.7. Significance of the study**

Studies have been conducted to explore the roles of principals as instructional leaders, but HoDs as middle managers have been neglected, especially in South African schools (Bush, 2008; Christie, 2001; Taylor, 2008). Research has not addressed the changing dual roles of HoDs as leaders of the curriculum and classroom teachers and how this impacts on their ability to perform their tasks effectively.

As South Africa has changed dramatically over the last 20 years, education in particular has been through many significant curriculum and structural changes, and teaching and leadership roles have placed numerous demands on school principals, HoDs, senior leaders and teachers in trying to manage these changes.

In aiming to explore the leadership role of HoDs regarding the effective delivery of the curriculum, this study may assist in the development of a standardised model, which can be used to inform leadership and management training for HoDs across various school contexts.

Furthermore this study could shed more light on how to lead and manage the curriculum effectively in many challenging school contexts in South Africa where a lack of school infrastructure and resources play a vital role in learner development and outcomes (Maringe & Vilakazi, 2015). Given that instructional leadership is a largely accepted concept to improving school outcomes and learner achievement, it is simply one piece of the puzzle in a complicated nexus and ever changing world of leadership studies (Blasé & Phillips, 2010 & Bush, et al. 2010).

This study aims to provide insight into what instructional leaders do in their schools to enhance teaching and learning and the effects of their behaviour on teachers' performance and well-being. To conduct a study of this nature, an appropriate research design method was adopted which will be further discussed in chapter 3.

## **1.8. Overview of the Research Methodology**

To gain a deep understanding of the research problem being explored, an interpretative qualitative research method was selected for this study (Babbie & Mouton, 2001). Seeing that the study's aim is to gain the perceptions of people to understand the role of the HoD as instructional leader, a qualitative approach was appropriate to achieve this. In the qualitative research approach, the researcher gathers data based on direct communication with the participants in their natural setting (McMillan & Schumacher, 2014). A qualitative research method was the most suitable as the researcher was allowed to gain access into the participant's world to get a better understanding of the experiences and perceptions of staff about the instructional role of the HoD and the challenges they face in implementing these roles (Creswell & Miller, 2000). From the data collected the researcher was able to generate common themes and use these as a basis for the findings and summary of the study. The data collecting instruments were semi-structured, face to face interviews and open-ended questionnaires. The interviews were analysed using the Atlas ti software programme which assisted by coding the information to generate themes for the data collected (Smit, 2002).

The questionnaires were analysed using themes without the software programme as it involved teachers from different grades in three schools.

Purposeful sampling was used for the selection of the participants in the three schools as the study required specific people to answer the semi structured questionnaires. The interviews were conducted separately on days and times that were convenient for the participants. The questionnaires were administered to the participants of each grade individually and collected after a period of two days. Two data collection instruments were used to ensure the validity and credibility of the research content. Ethical issues such as confidentiality and the right to withdraw from the study and informed consent were considered for the participant's well-being. Further details describing the methodology used in the study is discussed in chapter 3.

## **1.9. Summary of Chapters**

This study has followed the structure below in order to meet the aims and objectives of the report.

**Chapter 1:** Provides the introduction and background, problem statement, research questions, aims and objectives, the rationale and significance of the study.

**Chapter 2:** Reviews the relevant literature used to inform the study and outlines the theoretical and conceptual framework.

**Chapter 3:** Describes the research methodology and design initiated in the study. It discusses the research process, the distribution and collection of data, the pilot study, issues of validity and reliability as well as limitations and delimitations.

**Chapter 4:** Presents the data, analytical procedures and the interpretation of the results are outlined and discussed according to common themes that emerged from the findings.

**Chapter 5:** Provides a reflective overview of the study and discusses key findings. The challenges HoDs face in their school environments taken from the data collected are outlined and suggestions are provided.

**Chapter 6:** Encapsulates the summary and concludes the research by providing areas for future research, implications and contribution of the study and concluding remarks are made.

## **CHAPTER 2: LITERATURE REVIEW**

### **2. Introduction**

This chapter outlines the conceptual and theoretical perspectives that inform the instructional role of a F. P. HoD, the characteristics of instructional leadership that impact on learner achievement and the models of instructional leadership that form the basis of this study. The concept of leadership and management are defined and the management of teaching and learning in the South African context discussed. This study is based on the instructional leadership model of Hallinger & Murphy (1985 & 2009) and Weber (1996). It reviews international and South African literature from journal articles, research reports, books and websites that pertain to the concept and theory of instructional leadership.

#### **2.1. The Notions of the Foundation Phase**

The Foundation Phase ranges from Grade R to Grade 3 in the S.A. schooling system. This phase is regarded by many educationalists as the first formal phase of schooling in S.A and is extremely important in establishing the basis on which learners will grow and develop successfully (PAM, 2016). It is believed by many parents, teachers and researchers that learners who are well grounded and perform well in the Foundation Phase in general will achieve good results in later phases of their schooling (Bush, 2013). Foundation Phase teachers in primary schools teach learners from Grade R to 3 within a prescribed Curriculum and Assessment Policy Statement (CAPS) curriculum. The class teachers usually teach all the subjects in the curriculum to the learners in their class which is quite different to the higher phases where subject teaching is done by specialist teachers.

The major challenge faced by the Foundation Phase in many schools today is the administrative tasks of teachers (Bush, 2015). If teachers could simply focus on delivering the teaching and learning content, learners would get more one on one attention from them and this would benefit the learners who face difficulties with

conceptual knowledge and skills. A second challenge faced by many teachers and learners is the language barrier that prevents teachers from reaching learners and understanding how to help them. Many learners are not well versed in the schools Language of Learning and Teaching (LOLT) which disadvantages them and many teachers lack knowledge of the learner's home language and are unable to code switch to assist them.

The large class sizes make it difficult for teachers to provide the much needed individual attention that many struggling learners require to bring them to an acceptable level of performance. The lack of adequate resource material and parental involvement also plays a huge role in the learners' progress. The lack of pedagogical content knowledge of teachers further hinders learner progress, especially in Mathematics and English. Other challenges such as poverty, child headed households, absenteeism of teachers and learners and lack of parental support all contribute to the slow progress of learners in the F.P (Maringe & Prew, 2015).

According to the ETDP, SETA's report Scarce and Critical Skills Guide 2015, the number 1 scarce skill in the education and training sector is F. P. teaching. There is a huge shortage of F. P. teachers in South Africa (Goga & Van der Westhuizen, 2012). This contributes to the challenges faced by schools in recruiting the best qualified teachers for the F.P.

## **2.2. Conceptual and theoretical framework**

A conceptual framework is a series of events that link key concepts and principles together (Vithal & Jansen, 2012). Therefore concepts form the basic parts of a theory and are regarded as its main elements (Neuman, 2011). A theory normally provides interrelated explanations between concepts and variables (Neuman, 2011). A theoretical framework according to du-Plooy Celliers, Davies & Bezuidenhout (2016) is a particular group of ideas and principles that show a connection to a situation that one chooses to explore. It is this conceptual beginning and frame of the study that provides a picture of the topic that has been selected to study (du-Plooy - Celliers et al., 2016). It is important

to provide a systematic conceptual and theoretical framework for a research study as it provides a lens through which your investigation or exploration will take place (Maree & Van der Westhuizen, 2009). Theory and practice cannot be separated from each other as past and present theories of leadership profoundly influence practice, policy and offer a useful framework for the development of leadership studies (Bolden, 2004). Theories shape the way we see the world and interpret data around us and some of the most dominant and powerful leadership theories offer a worthwhile context for defining leadership potential and development approaches (Bolden, 2004).

### **2.3. Defining leadership**

The topic of leadership has been an area of interest for many years and never before has the need for effective leadership been more strongly voiced than in the 21<sup>st</sup> century. It is argued globally that leadership holds the key to the success of both individuals and organisations alike (Bolden, 2004). Despite leadership being an important concept, it still remains an enigma as to what leadership actually is or how to define it (Bolden, 2004). Leadership is thus a complex concept that impacts on organisational, social and personal processes. It is based on a process of influence whereby people are inspired to work towards common goals through personal motivation (Bolden, 2004).

The concept of leadership is naturally defined differently by various researchers. Northouse (2017) identified leadership as a process in which an individual has influence over a group of people to attain a shared vision. Kotter (1990) distinguishes between leadership and management and concluded that management is about coping with complex situations while leadership is about coping with change. Schools as complex organisations of change require both leadership and management as complimentary activities in various situations on a daily basis. Kruger (2003) asserted that leadership is a process that involves defining and communicating a clear vision, mission, goals and objectives with all staff members. Steyn (2002) concurs that leadership is about empowering others to make worthwhile decisions instead of controlling them. This means that leadership is about creating schools where all staff members are involved in making decisions which lead to its success (Steyn, 2002).

Kruger (2003) argued that leadership entails managing curriculum and instruction, supervising and supporting teachers and monitoring learners' progress. Leithwood and Riehl (2003) articulated that leadership is a process of providing direction and exercising influence, while Yukl (2006) defines leadership as persuading followers to work towards a common goal. Leadership is described by Spillane, Halverson and Diamond (2001) as the ability to give others the freedom to bring about a major change to an important function or situation to assist an organisation to achieve its aims and goals. Grant (2006) declared that outstanding leadership is a crucial feature of outstanding schools. There is a general belief among authors (Hornig & Loeb, 2010, & Robinson, Lloyd & Rowe, 2008) that good school principals are the basis of quality schools and without the principal's leadership, attempts to improve teaching and learning would be unsuccessful.

It goes without saying that for schools to be successful, the quality of leadership plays a significant role. The leadership definition continues to evolve and expand, especially in education.

#### **2.4. Contrasting leadership and management**

The landscape of school management and leadership in South Africa has encountered significant changes since the apartheid era. Therefore it is important to distinguish leadership from management, although many researchers assert that this contrast may be spurious. Bolden (2004) and Kotter (1990) concluded that management is about coping with difficulty while leadership is about coping with change. Bolden, 2004, proposed that management is about bringing order to organisational processes and goals while leadership is necessary for vigorous, energetic change (Bolden, 2004).

Although Kotter (1990) makes a clear distinction between leadership and management, he agrees that both are equally important and necessary for the effective functioning of an organisation. Gosling and Murphy (2004) propose that a leader must ensure there is a balance between leadership and management during times of change. For Mintzberg (1973) leadership is seen as one aspect of many management roles. The tendency to distinguish between leadership and management over recent years has led to leadership being perceived as an art where the leader uses individuality and innovation to steer the

way through situations while the manager is regarded as a problem solver who uses control to reach a solution (Bolden, 2004).

The authors Bennis and Nanus (1985, p.21) advocate that managers “do things right” while leaders do “the right thing”. The difference between leadership and management stated by Kotter (1990) clearly advocates a move away from procedural administrative measures of management features to a more flexible, powerful and effective style of leadership. Having said this Kotter (1990) agrees that both concepts have the same importance and are necessary for effective organisational functionality.

Therefore leadership and management although different in nature are concepts that are needed when working alongside people in any organisation.

Leadership and management are different phenomena which have many common features. Both concepts require influence and working together to achieve common goals. Northouse (2017) argues that while there are similar features, there are nevertheless many significant differences as well.

Whilst the contrast between leadership and management may be useful during change, the representation of them as two extremities can be misleading and harmful in practice. If it is true that leaders and managers are different people then this is clearly underestimating the potential of people placed in these leadership and management roles (Bolden, 2004). This however does not mean that all people will be proficient in all aspects of leadership and management, but when seeking people for these roles, we need to enlist those who are both leaders and managers as a whole (Bolden, 2004).

## **2.5. The concept of Instructional Leadership defined**

There is a general belief worldwide that good school leaders are the basis of successfully performing schools and without their efforts learner achievement would not be possible. Notably, a particular type of leadership is required from school leaders, that being ‘instructional leadership’ (Naicker et al., 2013). Instructional leadership is not a new concept in school leadership and management and there has been much importance placed on school leaders to engage in instructional leadership practices (Naicker et al., 2013). The concept instructional leadership is difficult to comprehend and Bush (2008)

believes there is a lack of clear description and explanation of the concept which may have different meanings. Therefore it would be helpful to provide several useful definitions of this concept.

The most straightforward definition is provided by King (2002) who sees instructional leadership as any action performed by leaders to improve teaching and learning in schools. Researchers, Bush and Glover (2003) define the concept as leadership that puts teaching and learning in the forefront and places a focus on teacher's behaviour when working with learners. Here the leader positively influences the teacher's classroom practice to improve the learners' performance. According to Spillane (2006) leadership is not only the principal's responsibility; and should therefore be spread over many individuals at all levels in a school.

Hopkins (2003) asserts that instructional leadership is about creating teaching and learning possibilities for both teachers and learners. This implies that the focus of instructional leadership should be placed on all members of the school where growth and development are central to features of improvement. In a more specific view of instructional leadership, Daresh (2007) and Elmore (2000) suggest that it is quite different from general school leadership and is therefore a type of leadership that focuses on the guiding and directing of instructional practices based on improvement of learner performance.

Leithwood et al. (1999) provide their perspectives on the nature and focus of instructional leadership and agree that it is the behaviour of teachers as they go about their daily activities which directly affect learner's growth and development. These authors assert that the principal in his own capacity cannot meet all of the school's needs for instructional leadership so other staff members need to share the responsibility of instructional leadership so that teaching and learning is enhanced across the school environment. Research conducted on instructional leadership found that proficient, expert and talented leadership was a fundamental factor for successful change, school improvement and school effectiveness (Hallinger, 2003).

The most accepted conceptualisations of instructional leadership show the following; leaders are thought to be strong in coordinating, controlling, supervising and developing

curriculum. Furthermore these leaders, who were active participants in the improvement of teaching and learning, were goal orientated, focussed and architects of culture (Hallinger, 2003). Although much of the available literature pertains to the principal as instructional leader, this study is based on the HoD as instructional leader, as the HoD works directly with the curriculum and teachers in the classroom setting. According to Spillane (2006) leadership is not only the principal's responsibility; therefore instructional leadership should be spread over many individuals at all levels in a school.

The vast range of literature reviewed has been applied to the HoD as instructional leader. The above definitions show instructional leadership as a concept which places strong emphasis on teaching and learning.

Therefore, this research study considers instructional leadership practices as important knowledge for all leaders who wish to transform their schools into highly successful centres of teaching and learning (Naicker et al., 2013).

## **2.6. Models of instructional leadership**

Since the early 1980s, studies on principal leadership have led to the proposing of several models of instructional leadership by researchers (Hallinger & Murphy 1985, 2000 & 2009, Weber, 1996, Crankshaw, 2011 and Shatzer, Calderella, Hallam & Brown, 2013 cited in Mestry 2017). Among these models are two that are prominent in the leadership literature, that of Hallinger and Murphy's 1985 model, and later Weber's 1996 model of instructional leadership (Naicker et al., 2013). The theoretical framework for this research study is based on Hallinger & Murphy's (2009), and Weber's (1996) models of instructional leadership which is an extension of Hallinger & Murphy's 1985 model. The model proposed by Hallinger and Murphy (2009) forms the basis of this study as it is the most frequently used model in empirical studies.

### **2.6.1. Hallinger and Murphy's Model**

Instructional leadership models first emerged in the 1980's in the field of educational leadership and management studies on effective schools (Hallinger, 2003). In juxtaposition to many earlier leadership models relating to school leadership, this model focuses directly on the way school leaders (principal's, HoDs, Subject and Grade heads)

exercise leadership to improve educational outcomes (Hallinger, 2003). This model identified powerful, management and guidance that focuses on curriculum and instruction from the leader to ensure that schools were effective in teaching and learning (Hallinger, 2003). The model shaped much of the thinking about effective principal leadership that spread in the 1980s and 1990s internationally. Therefore it became a popular model that was adopted by most principals (Hallinger, 2003).

With the emergence of school restructuring during the 1990s, many scholars and practitioners began to familiarise terms such as shared leadership, teacher leadership, distributed leadership and transformational leadership (Hallinger, 2003).

This showed that many were dissatisfied with the instructional leadership model as it focused too much attention on the principal as instructional leader and as the centre of power, expertise and authority (Hallinger, 2003). Nevertheless it is quite encouraging to note that over the past thirty years instructional leadership has undergone much empirical study. Instructional leadership being one of the lasting legacies of the effective schools movement is still alive and employed in many schools around the world.

Hallinger (2009) offers three features as basic requirements for effective instructional leadership, “*defining the mission of the school, managing the instructional program and promoting a positive school learning climate*” (Mestry, 2017, p.263). Defining the school’s mission highlights the principal’s role in developing the core purpose of the school (Mestry, 2017). This involves working with staff to set clear goals, communicate them widely to ensure the effective academic progress of learners. Managing the curriculum requires the leader to be fully active in leading and managing the teaching and learning process in the school with commitment and expertise (Mestry, 2017). The third dimension involves the principal setting high standards, promoting a positive learning environment and developing a culture of continuous improvement that provides incentives for learners and staff alike (Mestry, 2017). The leader must be visible at all times particularly in the classroom, modelling values and attitudes that create a supportive culture of teaching and learning while focusing on the improvement of learner results (Mestry, 2017).

Drawing on research articles obtained from literature on instructional leadership both internationally and in South Africa the study has shifted focus from the principal as instructional leader to the F. P. HoD. Research conducted by King (2002, Elmore (2000), and Spillane, Halverson, and Diamond (2001) affirms that this important role extends beyond the range of the principal and involves other leaders as well. The key players in instructional leadership are the deputy principal, HoDs, senior teachers, grade leaders and subject heads (Joyner 2005).

Weber's (1996) model is based on five essential dimensions of which the first three are similar to Hallinger and Murphy's 1985 model. The first dimension is *defining the school's mission*, the second is *managing curriculum and instruction* and the third is *promoting a positive learning climate* (Naicker et al., 2013).

The fourth dimension *involves the leader observing classroom practice and improving learner performance by growing professional development opportunities*.

The last dimension is about *assessing the educational programme whereby the leader joins in and participates in the planning, structuring, managing and examining of assessments to determine the effectiveness of the curriculum* (Naicker et al., 2013).

## **2.7. Defining the nature and characteristics of instructional leadership**

In relation to the above features, instructional leadership is based on the expectation that leaders must set clear goals, maintain discipline and implement high standards which will improve teaching and learning (Steyn, 2002). When discussing school – based management Steyn (2002) states that the principal is not the only figurehead, deputies and HoDs as instructional leaders should perform these five functions;

- setting clear goals, mission and objectives with the collaboration of staff members
- managing and coordinating the curriculum and instruction to ensure optimal teaching time.
- supervising teaching so that educators get guidance and support to deliver the curriculum effectively
- monitoring and evaluating learner progress to provide support to both teachers and learners for improvement

- promoting an instructional climate by creating a positive learning environment where teaching and learning can take place with support and collegiality

Effective instructional leaders are deeply concerned with specific aspects of teaching and learning, curricular and instructional issues that directly affect pupil achievement (Joyner, 2005). Researchers Van de Grift and Houtveen demarcate educational leadership as “the ability of a principal to initiate school improvement, create a learning orientated educational climate, stimulate and supervise teachers in such a way that the latter may exercise their duties as effectively as possible” (1999, p. 373).

Instructional leadership largely consists of leader behaviours that set high standards and clear goals for learner and educator performance, monitoring and providing feedback regarding teaching and learning, providing and promoting professional growth for all staff members, and helping to create and maintain a school climate of successful outcomes and achievement (Blasé & Phillips, 2010). Furthermore, “the principal must communicate a clear vision on instructional excellence and continuous professional development consistent with the goal of the improvement of teaching and learning” (Blasé & Blasé, 1999, p. 2). Instructional leadership has always been associated with Principalship. However, according to Banda (2012), principals are no longer the only instructional leaders in schools. He added that schools have been restructured to empower middle managers, teachers and learners.

This has resulted in the distribution of leadership which ensures that teaching and learning are the key focus of the school. Banda’s (2012) argument is linked to the findings of Kruger (2003) who declared that many principals are not directly involved in leading and managing teaching and learning, as this is largely the task of the HoDs in each phase of the school. Bush (2013) confirms this by stating that the task of managing the curriculum in the classroom is delegated to the HoDs as well as other senior staff who are also instructional leaders due to the pressure on principals. Sharing Bushes’ (2013) sentiments about HoDs being experienced and highly successful practitioners in the classroom are Hoadley, Christie and Ward (2009) whose investigative school study revealed that principals spend most of their time on administrative functions and disciplining of learners and therefore have very little time for curriculum matters.

According to Hallinger (2005) instructional leaders are strong leaders providing guidance and management in order to turn their schools around. Instructional leaders were seen as leaders who fostered high expectations and standards for their staff and students. Hallinger contends that instructional leaders are goal oriented and provide a coherent path for the school. These leaders motivate others to achieve and their focus is on the improvement of student academic outcomes. Instructional leaders focus not only on leading but also on managing and are hands on and not afraid of engaging with teachers to develop strategies for improvement (Hallinger, 2005). Southworth (2002) adds that instructional leadership is developed when leaders learn most by reflection while doing their jobs, have pedagogical knowledge to understand the curriculum and assist students and teachers and have the time to facilitate professional dialogue and development. Once these conditions are prevalent the school becomes a teaching and learning organisation, where instructional leadership can be exercised and teachers feel confident and supported to become learners in their own environment (Southworth, 2002). After examining school leadership in various contexts, new studies by Horng & Loeb (2010) have proposed that schools that had high student success most likely had leaders that were strong organizational managers. These authors have moved away from the normal interpretation of instructional leadership and have proposed an extended version of instructional leadership which they call 'organisational management' (Horng & Loeb, 2010).

They assert that, powerful leaders build strong organisational structures rather than observing classroom instruction and developing teachers (Horng & Loeb, 2010). These leaders successfully employ and support staff, have good financial skills, distribute resources adequately and preserve beneficial working and learning school environments to achieve goals (Horng & Loeb, 2010). They conclude that a leader's ability to attain student achievement largely depends on their organisational management expertise and leadership potential (Horng & Loeb, 2010). The emphasis here is for leaders to influence classroom teaching and learning by not simply focussing on classroom observation but spending time on everyday instructional activities, equipping schools with effective teachers and supporting them with conducive teaching and learning environments which would impact on student growth.

There is distinct consistency across research studies about what constitutes effective leadership and this expands our understanding about leading and managing the curriculum. The notion of distributed leadership which is at the helm of instructional leadership, posits that there are a number of competent people in a school to lead and manage and emphasis should not be placed only on the principal (Hoadley, Christie & Ward, 2008). This means that leadership is best spread over many people and circumstances in an organisation. This suggestion is important for the study's focus, which is based on the HoD as instructional leader.

Equally significant for this study are the six leadership dimensions proposed by Hoadley in a (2008) study conducted with principals in South African Secondary schools. The findings show the value of instructional practices and their impacts on learner performance. The six dimensions which are important for education in South Africa are based on the *instructional focus of the school, social relations within the school, controlling resources, relations outside the school, vision and expectations and dispersal of leadership* (Hoadley, 2008). These dimensions are essential and contribute to the instructional focus of the school and lean towards the improvement of learner outcomes and achievement (Hoadley, 2008). Hoadley's instructional dimensions link to Hallinger and Murphy's six domains and provide stronger evidence that effective instructional leadership practices influence teaching and learning.

Regardless of its importance and long existence instructional leadership as a model for improvement has been criticised by many scholars. The first criticism is that it is mainly concerned with teaching rather than focusing on learning. The second is that it only focused on the principal as being the person with all the expertise and authority to affect change in the school (Bush, 2013). As a result it downplays the role of other leaders, deputies and HoDs to lead and manage the curriculum effectively (Bush, 2013). Lambert (2002) strongly critiques this concept and says that there cannot be one instructional leader for the entire school without the participation of other teachers and team leaders. These criticisms have led to a partial shift towards the relationship between teaching and learning and have resulted in a new term which Bush (2013) promotes as 'shared instructional leadership' which is linked to the focus of this study.

## **2.8. The Changing Face of Instructional Leadership**

The roles and responsibilities of principals, deputies, HoDs and other senior leaders have changed and expanded over the past ten years and now include a wider range of teaching and learning practices, professional development activities, decision making and responsibilities (King, 2002). Keeping student achievement at the forefront, instructional leadership includes the actions that leaders do to improve teaching and learning in their school environments. This perspective asserted by King (2002) suggests that instructional leadership may be regarded as non-identical in different school communities. This implies that the focus of instructional leadership largely depends on the needs of the individual school context. Thus administrators of instructional leadership encounter a range of challenges in implementing instructional practices.

However, they still need to keep their attention and interest on improving teaching and learning to achieve school goals (King, 2002). Various school related factors should not pose an obstacle for the implementation of instructional practices.

## **2.9. The HoD as Instructional Leader**

Early thoughts of instructional leadership disregarded the contribution made by senior managers, teachers and other staff towards instructional practices (Robinson et al., 2008). Recent studies adopt a more comprehensive view with principals and SMTs, as well as other responsible staff members sharing instructional leadership roles (Robinson et al., 2008). Current investigation into the impact of instructional leadership on student outcomes has revealed that the principals indirect contribution towards student learning although significant is fairly minor (Robinson et al., 2008). This conclusion confirms that the task of instructional leadership cannot only be the responsibility of the principal, but is effective when shared among deputies, HoDs and other senior teachers in the school (Robinson et al., 2008). Instructional leadership is therefore comprised of the actions of the HoD and the tasks that they allocate to others to perform that lead to the improvement of teaching and learning. This study will focus on the HoDs role as instructional leader and how their actions impact on teaching and learning.

Bush (2009) asserts that the quality of leadership in schools makes a significant difference to school and learner outcomes. The HoD as leader of the instructional programme plays an important part in the successful delivery of the curriculum. With the 21<sup>st</sup> century being the age of growth in technology, schools are expected to assist learners to acquire knowledge and skills that will benefit them to reach success in school and life after. Therefore, the demands placed on educational leaders to develop instructional leadership skills are increasing so that they can promote effective teaching and learning. This requires leaders to develop intellectual, personal, social, emotional and physical skills to enable them perform their jobs efficiently (Ghavifekr & Ibrahim, 2014).

Studies conducted by Ghavifekr & Ibrahim (2014) on the role of the HoD as instructional supervisor, show that the HoD influences teachers' job performance significantly by developing and supporting their teaching practice and enhancing their professional performance in school. HoDs provide motivation and play a vital role towards teacher competencies which help them to perform better. HoDs as instructional leaders need to be practicing class or subject teachers to provide useful information on curriculum matters to help teachers improve their teaching roles.

Studies done by Ghavifekr and Ibrahim (2014) show, those HoDs who provided useful resources, professional growth and development and transference of knowledge and skills helped teachers to enhance their competencies in classroom practice. HoDs that are seen as a sign of accomplishment for their teachers played a huge role in motivating and encouraging them to work hard to achieve success (Ghavifekr & Ibrahim, 2014).

The study by Ghavifekr and Ibrahim (2014) showed that HoDs played an important role and a positive relationship between them and their teachers improved and enhanced teachers performance, competency and motivation. The HoD needs to possess good qualities and characteristics for the betterment of both leaders and followers (Ghavifekr & Ibrahim, 2014). This helps them both to build a strong platform for teaching and learning. Therefore HoDs as instructional leaders impact positively on teachers' performance, professional development, motivation and classroom practice. The HoDs

role as an instructional supervisor is crucial for the performance and upliftment of learner success in schools today (Ghavifekr & Ibrahim, 2014).

A current local and international trend in educational reform is the devolution of decision making power to schools and is based on the assumption that the engagement and contribution of educators, parents and learners working together can improve the transformation of schools (Steyn, 2002). Steyn asserts that with new challenges and responsibilities faced by principals, there is a need to create schools in which more people are involved in the decision making process (Steyn, 2002). This confirms the important instructional role played by the HoD in South African schools.

Research done by King (2000) on effective leaders, noted the various directions that leaders took to achieve their essential functions as instructional leaders and contended that leading teaching and learning practices, growing leadership capacity, creating conditions for professional growth and development, using relevant data to make knowledgeable decisions and using resources imaginatively are what good instructional leaders do to improve teaching and learning. This is consistent with what supporters of instructional leadership practices propose.

When taking on the role as an instructional leader it is important to be competent and able to support, encourage and motivate teachers to grow and develop their performance (Yukl, 2010). While the principal remains the central focus of providing leadership and management in all areas of the school, the HoD as manager of the curriculum plays an equally important part in the successful delivery of the curriculum. Managing teaching and learning is one of the core responsibilities of the HoD and therefore they must fulfil the central task of leading and managing the instructional programme in their schools (PAM, 2016).

## **2.10. Roles and Responsibilities of the F. P. HoD**

Outlined in the DoE's Government Gazette (PAM, 2016) is the core roles and responsibilities of the HoD. The aim of the HoDs job is to be responsible for the effective running of the department as well as ensuring that the education of all learners is promoted in a positive and acceptable manner (PAM, 2016). In addition to these roles the

HoD must develop policies for the phase and provide guidance and support to all staff by communicating ideas on the latest educational approaches, techniques and evaluation of curriculum material (PAM, 2016). The document also highlights the HoDs responsibility towards the educational welfare of all learners in the department by communicating with all stakeholders in order to promote and maintain a good teaching standard (PAM, 2016). Stated in the document is the HoDs role in assisting with the planning and management of the curriculum, while participating in appraisals will provide a review of the professional practice of staff with the aim of improving teaching and learning and directing the curriculum in a positive direction (PAM, 2016). The PAM (2016) although an updated version, does not specifically provide for the role of the HoD as instructional leader.

According to studies done by Wildly and Dimmock (1993) the HoD plays an important role in setting school goals, implementing effective strategies to achieve them and defining the core purpose and aims of schooling.

These researchers assert that HoDs must provide appropriate resources, supervise, monitor and evaluate the performance of both staff and learners to create collegial and collaborative relationships as this forms part of effective instructional practices.

Hammond (1999) outlines the three main roles of HoDs, leadership, management and administration. This resonates with Fletcher and Bell's (1999) study which highlights eight roles and responsibilities of leaders. They assert that leaders are resources providers and administrators, influencing others by being good role models of classroom practice, chairing meetings, motivating teachers, playing an advisory role and providing constructive feedback. In the study leaders were viewed as monitors, evaluators and moderators of classroom practice. Providing professional development according to one's specific needs and keeping teachers abreast of new trends in education was perceived as necessary tasks of HoDs. The DoE (PAM, 2016) has outlined similar roles of the HoD which have been highlighted above.

### **2.11. The significance and importance of instructional leadership**

The quality of education in South Africa since 1994 indicates that teachers perform poorly in primary schools which impact on learner results (Spaull, 2013). Southworth promotes the concept of instructional leadership and the need to establish teaching and

learning schools (2002). One of the most important aims of the DoE is to restore a sound quality of teaching and learning. The government has introduced many plans, strategies and changes to the curriculum to do this. This has resulted in acknowledging the importance of instructional leadership practices to improve learner performance. Instructional leadership is one of the core responsibilities of leaders and is stated in the PAM document as an important role of school staff (2016). There is general agreement in the literature, that school managers play a significant role in laying the foundation for improved instruction (Hoadley et al., 2000). The purpose of restructuring schools was to empower school leaders to improve the culture of teaching and learning.

Research by Hallinger & Heck (2011) show that schools with strong instructional practices shaped the school's direction and set a climate conducive to learning. These schools define and communicate visions and missions, manage the curriculum and instruction of learners to enhance teaching and learning.

Instructional leadership encourages leaders to focus on improving the classroom practices of teachers which is important for school success (Leithwood, Seashore, Anderson & Wahlstrom, 2004). It emphasises the importance of keeping teaching and learning at the forefront of all school activities. Therefore it provides the basis to improve teacher quality and instruction by building a professional community of educators (Hoadley, 2008). This type of approach encourages school leaders to influence classroom teaching and learning by recruiting effective teachers who would render excellent delivery of the curriculum (Horng & Loeb, 2010). By implementing instructional leadership practices leaders work together with staff to frame school goals, promote professional development, support guide and encourage reflective teaching and learning (Mestry, 2017).

It can be asserted that instructional leadership helps empower and inspire teachers by providing them with support and control for teaching and learning. It provides incentives for teachers to develop innovative classroom strategies to improve teaching and learning for both teachers and learners in schools (Mestry, 2017). Instructional leadership demands that the main role of leaders is to take charge of curriculum and assessment issues so that learner performance is improved. This comprises many key areas of leadership such as good and open communication, trusting relationships, motivation,

collegiality, supervision, support and modelling good behaviour (Mestry, 2017). Instructional leadership is important as it requires leaders to focus on all aspects of the school to promote effective teaching and learning. Therefore instructional leadership is an important and essential part of how schools work and learn together to achieve success. Effective instructional leadership practices ensure successful learning outcomes for teachers and learners and create high performing schools

## **2.12. Managing teaching and learning in South African schools**

It is becoming widely recognised in South Africa, that managing teaching and learning is regarded as one of the most important tasks for principals and school leaders. Leading and managing teaching and learning forms part of the core areas of discussion in the South African Standards for School Principals and is therefore part of education policy (Bush et al., 2010).

This type of managing of teaching and learning is referred to as instructional leadership and requires the principal to create and support suitable conditions under which effective teaching and learning takes place to promote the best possible learner achievement (Bush et al., 2010).

Instructional leadership requires leaders to make a difference in classroom practice by assuming a proactive approach and turning around learner achievement (Bush et al., 2010). Learner outcomes are greater when there is direct leader intervention in curriculum planning and coordination and teacher growth and development. Leaders can make a difference to learner outcomes only if they remain close to teaching and learning in schools. In South African schools, principals and leaders are mainly focused on management and policy issues and have little or no time for curriculum matters.

Bush, et al, 2010, note that South African principals have little experience of instructional leadership, yet managing teaching and learning is one of the core modules in the national ACE programme (Bush et al., 2010). Although leading and managing teaching and learning is recognised as an important role for school principals, deputy principals and HoDs, it is not ranked as the most important school activity by them. Administrative tasks take precedence over teaching and learning.

Bush & Glover (2009) claim that if a principal was focussed on instructional leadership practices then the following would be done in schools; leaders would manage the curriculum across the school, evaluate learner performance through assessments, monitor the work of HoDs and teachers, engage in IQMS and provide feedback and ensure that appropriate resources are available to support teaching and learning. HoDs play an important part in managing teaching and learning in schools and as middle managers their focus should be on the different grades in their respective phases, while the principal and deputy adopt a whole school approach to managing teaching and learning. Therefore middle managers are important role players in developing learning-centred leadership in schools and the NCSL argues that they should be leaders in the teaching and learning process (Bush et al., 2010). This means that HoDs must lead by example, know what goes on in the classroom, and encourage dialogue by talking and listening to colleagues and setting up appropriate systems and structures to improve teaching and learning (Bush et al., 2013).

The first extensive study of middle managers in South Africa conducted by Ali & Botha (2006), found that with the introduction of the new curriculum, the responsibility of school managers has now moved towards performing instructional activities for the achievement of high quality outcomes. They maintain that if teaching and learning were to improve significantly then HoDs would need to spend more time supervising learning activities. They conclude by saying that HoDs should spend more time analysing learners' performance, developing departmental improvement plans, monitoring classroom records regularly, observing teaching in the classroom and developing improvement targets with teachers (Bush et al., 2010).

Current research on leadership and management of teaching and learning is dictatorial and fails to take into consideration the various schools contexts, lacks description of what effective practice is and focuses more on successful schools than underperforming or poor schools (Southworth, 2002). If the main purpose of schooling is to promote teaching and learning, then school leaders need to enable learners to gain qualifications that will ensure a better life for them. Given the high importance placed on learning, school leaders need to make the management of teaching and learning their top priority. Too much emphasis is being placed on administration which leaves little time for the core

purpose of the school. Principals, deputies and HoDs need to set clear goals demonstrate good practice in their own classrooms and monitor and evaluate the teaching process (Bush et al., 2010).

Christie (2010) asserts that learning is the main goal of schooling and draws on four important dimensions; teacher learning, student learning, organisational learning and the principal as the person leading learning. She concedes that leading the learning process is extremely complicated and demanding. All the literature presented above provide many different perspectives on managing teaching and learning, in the context of schools and attaining and maintaining the level of a successful school is difficult and complex as school leaders, teachers and learners have conflicting views and ideas of learning (Christie, 2010). The development of effective teaching and learning, demands that all school leaders play a specific role in the delivery of the curriculum to ensure learner improvement and success (Bush, 2013).

The starting point is to create a school climate that promotes a positive learning environment among all stakeholders and this will provide the best possible education for learners and teachers. Once this has been completed only then can high standards of achievement be attained.

### **2.13. Challenges faced by HoDs in implementing instructional leadership**

Current literature shows that changes in educational reform have altered the role of leadership. Instructional leaders are expected to perform in a continually complex environment and are therefore required to serve teachers, learners, parents and the community with many different needs and desires (King, 2002). HoDs must improve the intake of quality teachers, maintain school safety and create learning communities. Being closely viewed by district officials, parents, media and society, leaders are mandated to lead and manage difficult school environments to ensure their schools success (King, 2002).

Stephenson (2010) asserted that skills, qualities and knowledge are what HoDs need to fulfil their roles as managers and leaders of the curriculum, yet many don't have

specialist training and skills as instructional leaders which then impacts negatively on their ability to provide guidance and support to their followers (Hoadley et al., 2009). Hoadley et al, 2009 identified curriculum changes, quantity of work, lack of professional development, time, administrative overload, school context and confusion of their roles as real challenges facing HoDs.

HoDs are faced with different obstacles and in South African schools many learners suffer a range of socio-economic problems (Bush et al., 2010). Research done by Hallinger, 2003 and Fleisch, 2008, show that parent illiteracy affects the learning process as many parents are unable to help their children in English and Maths. The lack of resources at home to assist learners to reinforce concepts also poses a challenge for their learning (Bush et al., 2010). Overcrowding in schools is another challenge for HoDs as this adds to the volume of work for both teachers and the SMT. Learner absenteeism, apathy and poor discipline posed a challenge for HoDs (Bush et al., 2010).

Teachers lack of collegiality and collaborative efforts make monitoring of their work challenging (Bush et al., 2010). Disagreements between HoD and staff members also made it difficult to reach consensus about school matters and personality clashes caused problems for HoDs (Bush et al., 2010). Many of these challenges faced by HoDs are consistent with the findings of this study and will be explored in chapter 6.

#### **2.14. Gaps in understanding the role of instructional leadership at the Foundation Phase level in South African Schools.**

In reviewing literature for this study, the researcher has found that much of the work conducted on instructional leadership focuses more on the principal and not the middle manager. The role of the principal as instructional leader has been over emphasised and therefore not much research exists on the role of the HoD. This created a huge gap in the literature about HoDs and their roles as leaders of the curriculum (Bush, 2015). In South African schools, the instructional leadership concept is rarely emphasised by principals and when HoDs are required to implement this concept, they are clearly unsure of their roles as instructional leaders. S. A. teachers have also not been workshopped or provided sufficient training on this concept. Although it is mentioned at Professional Learning Communities as an important concept, it is not given priority in many schools today.

Many teachers and F.P. HoDs lack understanding about the nature and concept of instructional leadership. More emphasis is placed on administrative tasks and discipline and teaching and curriculum is overlooked (Hoadley, 2009). In S.A. schools, HoDs play a major role in instructional leadership and many themselves have not been fully trained on instructional leadership practices. This causes confusion among teachers in schools and they are not sure of what is expected from their HoDs role as instructional leaders.

In many S.A. schools the HoD struggles between class teaching and administrative duties. A further gap exist as many teachers and principals do not understand the functions of the HoD as instructional leader which must be emphasised at professional development courses and should form part of what they do and are assessed on (Hoadley, 2009).

There seems to be a misunderstanding in S.A. schools that only the HoD is the instructional leader and should fit this role. Lambert (2002) argues that we can no longer expect only one leader to play the role of instructional leader. Therefore the instructional leadership role is a professional part of all the stakeholders in a school and should be a shared task (Lambert, 2002). Teachers need to realise that instructional leadership is an essential part of a teacher's professional life and without their participation the HoD cannot fulfil the role of leadership for learning (Lambert, 2002). Many HoDs are not trained in instructional leadership practices yet are expected to change the behaviour of teachers and learners to improve teaching and learning. This creates the misunderstanding that HoDs have all the answers and their roles as leaders and managers of the curriculum are easy (Le Fevre & Robinson, 2015).

F.P. HoDs are expected to have expert knowledge in all subjects as laid out in the CAPS document, yet many were not sufficiently trained and this makes their roles as instructional leaders difficult. As instructional leaders, teachers expect HoDs to fulfil their roles without hesitation, and when they are unable to provide this assistance, their roles as leaders and managers are questioned. Many level one teachers are not familiar with the roles and responsibilities of the F.P. HoD and this has created a gap in their understanding of what is expected from their leaders. If the HoD is accountable for F.P. then their roles have created gaps because the HoD can only achieve success with the buy in from all stakeholders. Furthermore the concept of instructional leadership has not been

fully integrated into all schools in S.A. and this makes it difficult for instructional leaders to perform their roles adequately at all levels (Bush, 2013).

## **2.15. Conclusion**

The vast body of literature reviewed in this chapter seems to be clear about the importance of instructional leadership in improving learner performance. Actions taken by principals, deputies, HoDs, and teachers influence what transpires in schools and particularly in classroom settings (Hallinger, 2003). Though much evidence points to school contextual factors, instructional leadership practices are found to influence the quality of school outcomes and when aligned with its vision and mission, effective teaching and learning will lead to successful school results. In the South African school context, the role of the HoD as instructional leader is crucial because they work closely with the delivery of the curriculum. Their role as instructional leaders cannot be ignored as they are the teachers' immediate supervisor and their basic responsibility is to provide assistance and mentor and coach teachers in their daily curriculum activities. Perhaps the most important task of principals is to provide many forms of leadership and invite HoDs and teachers to join in as designers of a shared leadership approach to teaching and learning. The next chapter discusses the methodology used in the study.

## **CHAPTER 3: RESEARCH DESIGN AND METHODOLOGY**

### **3. Introduction**

According to Cohen, Manion and Morrison (2011) methods refer to the different approaches used in educational research to gain data, used as a basis for reasoning, interpretation, explanation and prediction. This chapter highlights the paradigms, comments on the research design, focuses on the sources of data, selection of the participants and the instruments used in handling of the data collected.

#### **3.1. Paradigms in research**

The researcher's choice of a paradigm sets the tone for the aims, purpose, reason and expectations for the research (Mackenzie and Knipe, 2006). This study will explore the three dominant research paradigms namely, positivism, interpretivism and critical realism.

##### **3.1.1. Positivism Paradigm**

The positivist paradigm sets out to prove or disprove hypotheses (Mack, 2010). Positivists recommend the use of natural science methods to study and understand phenomena (du Plooy-Cilliers et al., 2014). They believed that science could improve people and their education and make the world a better place to live in (du Plooy-Cilliers et al., 2014). Positivists encouraged people to think for themselves, challenge societal norms, and discourage belief in myths and superstitions used to explain social and natural phenomena (du Plooy-Cilliers et al., 2014). The epistemological position of positivism is based on the nature of what constitutes valid knowledge and posits that this knowledge could only be gained from factual, verifiable evidence (du Plooy-Cilliers et al., 2014). Therefore only knowledge confirmed by the senses could be truly considered as knowledge (du Plooy-Cilliers et al., 2014). Positivists see clear distinctions between scientific and non-scientific information and one must therefore find evidence to support or reject their claims.

The positivist ontological view of reality is a single, unprejudiced, social and physical external reality that can only be observed and measured. For them reality has order, regularity and is controlled by physical laws (du Plooy-Cilliers et al., 2014).

Positivists are not interested in studying the unobservable internal intentions of an individual's behaviour but their research is based on findings that value honesty, integrity and trust. Their findings should be an accurate reflection of an objective reality and facts (du Plooy-Cilliers et al., 2014).

### **3.1.2. Interpretive Paradigm**

Interpretivism was developed as a response to the limitations of positivism. This paradigm focuses on the study of human beings as being different from objects as they constantly change due to the environment in which they find themselves in. Interpretivists want to study the behaviour of humans and aim to view things while gaining a detailed understanding of the topic according to the eyes of the people they are studying (du Plooy-Cilliers et al., 2014). They argue that common sense helps to direct people in their daily living and this is a vital ingredient needed to understand human behaviour. For interpretivists truth is based on people's views of facts and not on generalisation of data. The interpretivist tradition asserts that reality is a social construct based on how people assign meaning to their own experiences while they interact with others (du Plooy-Cilliers et al., 2014). This social world is not fixed, but is what people perceive it to be. This means that people experience reality in many different forms and so their reality is unique (du Plooy-Cilliers et al., 2014). Interpretivists see knowledge as something that should be examined within its historical and social surroundings (du Plooy-Cilliers et al., 2014). In this way they believe that there will never be permanent answers and therefore knowledge should result in action and have practical importance.

### **3.1.3. Critical Realism**

This paradigm is based on aspects from the positivist and interpretivist approaches and is combined in a theory which proposes that reality is a result of social conditioning and how we perceive it. Critical realists agree with positivists that science must be based on factual evidence (du Plooy-Cilliers et al., 2014). They do not predict, but use understanding and explanations to generalise their results. Their aim is to change society, release them from all forms of exploitation and assist and motivate them to form a better world for all. Critical realists believe that societal institutions, practices, ideologies, cultural and religious aspects all influence reality in a positive or negative manner.

For critical realist's freedom, emancipation and equality are valued (du Plooy-Cilliers et al., 2014).

## **3.2. Methodology**

### **3.2.1. Adopted Research Paradigm**

After discussing the three research paradigms, the researcher decided that the interpretative paradigm is the most appropriate for this study. This study is positioned within this paradigm as its approach to research, aims to understand "the world of human experience" implying that reality is a social construct (Cohen & Manion, 1994, p. 36). The interpretive researcher aims to understand and describe the meaningful social action and experiences of the topic. Theories play an important role in interpretive research and can be used as tools by researchers to make others aware of the difficulties of individuals. As this study is based on the instructional leadership model, the interpretivist paradigm leads to the understanding of the phenomena of the study and is therefore not based on generalisations. As the main aim of the study is to gain a richer and firmer understanding of human behaviour, the researcher was interested in gaining more knowledge about how people give meaning to their daily social experiences (Cohen & Manion, 1994).

### **3.2.2. Qualitative Research Design**

A qualitative research method was used in conducting this study as the researcher explored the roles and responsibilities of the HoD as instructional leader in the school environment. Qualitative research is described as a systematic approach which involves collecting data on natural phenomena in the form of words in a natural setting which is sensitive to people as opposed to numbers used by quantitative researchers (McMillan & Schumacher, 2014). This method is used when one's objective is to understand, inquire or to simply describe people's behaviour, themes in behaviours, attitudes or trends, or relationships between people's actions (du Plooy-Cilliers et al., 2014). An important consideration in qualitative methods is that your research has to secure the validity of your findings (du Plooy-Cilliers et al., 2014). In doing so one has to consider all the factors that may affect the end result of the hypotheses (du Plooy-Cilliers et al., 2014).

Qualitative researchers think that the best way to interpret different phenomenon is to see it in its context (Krauss, 2005). Many qualitative researchers assert that the best way to understand the nature of what is going on is to become engaged in it and then proceed

into the organisation being studied and have practical contact with the topic by observing facts and events thus becoming part of the experience (Krauss, 2005). The qualitative method enabled the researcher and the social settings to immerse and this opened the doors for greater facilitation and personalised understanding between the researcher and the participants (Poni, 2014).

### **3.2.3. Sampling Technique**

The process of being selective and choosing participants for the research study is called sampling as this helps answer questions to solve the problem under investigation (Wagner & Kawulich, 2012). In this study the researcher concentrated on a small portion of the overall population so that the results could be generalised to a larger population (Wagner & Kawulich, 2012). Participants for the study were selected through the purposive sampling technique which was the most appropriate method and three primary schools in Johannesburg were selected to assist the researcher to explore the role of the F. P. HoD as instructional leader (Coyne, 1996). This technique enabled the researcher to gather quality, reliable data from knowledgeable experts within schools in order to gain a clearer understanding of the concepts (Kreuger & Neuman, 2006). This non-probability type of sampling method started with the researcher who decided what needed to be known and set out to identify participants who had experience and knowledge to provide the necessary information (Tongco, 2007).

Information for this study was gathered from three principals, who represent their schools, three F. P. HoDs, who represent their departments and three F. P. educators who each represent the grades they teach in their school. The schools selected for the study were public schools, each located in different socio-economic areas, namely, a township school, an inner city school and a suburban school. A township school in Johannesburg falls under quintile 1 – 3 as rated by the DoE (Maringa & Prew, 2014) and are usually the historically disadvantaged schools. These schools are in areas of deprivation and many learners face challenging internal and external environments. In many instances the education levels of the parents are low and illiteracy is a major concern (Ngcobo & Tikly, 2010). Although these problems are rife, education provides an escape from township problems and a better life.

All these factors could hinder the effective delivery of the curriculum and make teaching and learning difficult for schools (Ngcobo & Tikly, 2010).

The inner city area of Johannesburg comprises the central business district, and the immediate residential area around it is densely populated and rapidly deteriorating (Olufemi, 1998). After the fall of the apartheid regime, the demographics of the inner city changed and many legal and illegal immigrants now occupy the area (Olufemi, 1998). The inner city of Johannesburg faces a shortage of housing, is overcrowded with poverty and other social and economic ills. This makes teaching and learning difficult as schools are overcrowded and under resourced. These schools receive a larger government subsidy as fees are low (Maringe & Prew, 2014).

The suburban school in this study is situated in the heart of the northern suburbs in Johannesburg. This area is comprised of the middle and upper middle class and the school is classified as an ex model C school. These schools receive a low grant from the government as they are allowed to charge a large amount of school fees and fall under the quintile 4 and 5 (Maringe & Prew, 2014). Suburban schools employ both GDE and SGB teachers to keep their learner teacher ratios manageable (Maringe & Prew, 2014). The standard of education is perceived to be of a higher level.

#### **3.2.4. Sources of data**

This research study was conducted by means of reviewing and evaluating the relevant literary sources on the topic and undertaking an empirical exploration at three primary schools in Johannesburg, Gauteng. The study utilised both primary and secondary sources to provide a suitable background to the investigation. According to du Plooy, Cilliers, et al, (2014) primary sources include any form of research that you require for the purposes of answering and solving the research questions. The primary sources used in this study are interviews and questionnaires. Interviews were conducted with the principals and F. P. HoDs in the three schools and questionnaires were administered to the three teachers of the F. P. in each school. Reviewed papers, journal articles, books, textbooks as well as education papers, online publications and articles, are used as secondary sources in the study.

### **3.2.5. Data collection strategies**

Polkinghorne (2005) asserts that qualitative data is collected primarily in the form of written and spoken language rather than in numbers. The primary data sources used in this study are face to face interviews, open-ended questionnaires and the use of audio-visual aids. McMillan and Schmacher (2014) have identified five important methods for obtaining data: interviews, observation, questionnaires, document analysis, and the use of audio-visual materials. The data derived from these sources were translated into written text for analytical purposes. By using these two methods to collect data the researcher's intention was to understand the subjective experiences of the participants and view concepts through their eyes to gain an accurate and rich understanding of the topic (Neuman, 2011). The principals and HoDs lead and manage the curriculum thus providing information directly related to the topic. The three teachers in the F. P. in each school answered questionnaires as they are the key players responsible for the delivery of the curriculum in classrooms and work under the guidance of the principal and HoD in the school.

### **3.2.6. In-depth interviews**

This study used standardised interviews with the same set of semi-structured, open-ended questions to collect data which allowed the researcher to ask participants specific questions on the topic (Appendices F and G). The main aim of using interviews was to gain the views, opinions, feelings and beliefs of the participants on the specific phenomenon of instructional leadership (du Plooy-Cilliers et al., 2014). This allowed the researcher to review and interpret the participant's responses and observe their non-verbal reactions whilst they engaged in answering the questions (du-Plooy-Celliers et al., 2014).

The researcher was able to probe into participants' responses and provide clarifications where needed (Turner, 2010). The face to face general interview approach was used, in an allocated setting, where the responses captured were voice recorded by tablet and cellular phone by the researcher. This method saved time and afforded the researcher accuracy when capturing the data. The interviews followed a conversational style and although predetermined questions were asked, the participants were allowed freedom and the researcher could adjust the focus of the interview when necessary.

A further positive of using interviews is that the researcher was able to build an amicable understanding with the participants and this ensured their cooperation and desire to be part of the study (du Plooy-Cilliers et al., 2014).

### **3.2.7. Questionnaires**

The use of self-administered questionnaires as the second data collection instrument was important to gain the responses of participants to the questions on the topic (Appendix H). The questionnaire comprised of open-ended questions and invited a small group of nine teachers in the F. P. to respond to them in their own words expressing their opinions, feelings and ideas (du Plooy-Cilliers et al., 2014). By selecting these specialist teachers as participants for the study, the researcher was assured of their competency to answer the questions and provide reliable information to the topic (McMillan & Shumacher (2014).

### **3.2.8. Audio-tape recording**

The individual interviews were audio recorded on two different devices, with the permission and consent of each participant (Appendix E and F). This ensured the precise responses of the participants which was stored safely and could be later retrieved for transcription purposes. McMillan & Schmacher (2014, p. 386) explain that “digitally recording the interviews ensures completeness of the verbal interaction and provide materials for reliability checks”. In this way verbal responses were accurately captured and notes were recorded for non-verbal responses. Therefore semi-structured interviews provided the most reliable source of information about instructional leadership from the perspectives of both the principals and HoDs.

### **3.2.9. Credibility (Validity) and Dependability (Reliability)**

Research methods used in a study to collect data must be reliable and valid (du Plooy-Cilliers et al., 2014). Reliability and validity in research are based on trust in the participants used to gather the information needed for the study. Validity and reliability used in the study was important for checking and validating the data collected. Qualitative researchers often refer to validity and reliability as trustworthiness, which is made up of four aspects, namely, credibility, transferability, dependability and confirmability (Lincoln & Guba, 1985). Credibility refers to the accuracy of the researcher in interpreting the data collected from the participants.

Transferability is the potential of the findings to be applied to similar situations which yield similar results (Lincoln & Guba, 1985).

In this study the researcher looked at the social reality that participants constructed and used the results of what they perceived it to be. This involved checking and examining the accuracy of the participant's responses of their narratives. The selection of common themes and categories were used to analyse the data to ensure that explanations and interpretations made sense (Creswell & Miller, 2000). Trustworthiness of the participants was ensured by selecting professional participants who had years of experience in their fields of duty. The researcher validated the results by accurately representing the participants' realities to the social phenomena that is credible to them. The credibility of this study was established by not only analysing the data using a reliable software programme but by also using the inferences drawn from them in a positive manner (Hammersley & Atkinson, 2007). The study has identified and engaged in common procedures for creating validity, such as thick descriptions, and external audit programmes (Smit, 2002).

### **3.10. Data Analysis**

Researchers, De Vos, Strydom, Delpont and Fouche (2011, p. 397) explain that qualitative data analysis is "the process of bringing order, structure and meaning to the mass of data collected". This process involved collecting the information, transcribing, analysing and interpreting, testing, confirming the findings and then presenting the data (du Plooy, Cilliers et al., 2014). The theorist Mckee refers to qualitative data as textual which he asserts is anything that we produce as an "interpretation of something's meaning" (2003. p.4). This can be in the form of oral, written or graphic multimedia such as books, photographs, film, music, or clothing. Qualitative analysis required the researcher to become totally engaged in the data, identifying and describing the dominant themes and patterns of meaning that emerged from the data. The method used to analyse the interviews was the computer assisted qualitative data analysis (CAQDAS). The Atlas ti software programme was useful in the analysis (Appendix I and J).

A necessary part of qualitative data analysis requires organising, accounting for and providing explanations of the data, this includes making sense of the data gathered from participants, defining situations, recording patterns, themes, categories and systems

(Cohen et al., 2011). The Atlas ti programme used was particularly effective in loading, analysing and retrieving the data collected. It enabled the researcher to link elements to themes and produce reliable data (Cohen et al., 2011).

### **3.11. Ethical considerations**

This study took into consideration all the ethical procedures that were necessary to ensure confidentiality of the participants used for the purpose of generating data. Ethics as stated by du Plooy-Cilliers et al. (2014) is the researchers promise to act in a responsible and reliable way, even when faced with difficult or unpleasant circumstances. The researcher should always maintain exceptionally high standards as a stakeholder who has the capacity to affect all other stakeholders involved. In order to conduct this study the researcher had to obtain ethics clearance (Appendix A) from the Ethics Committee at the University of the Witwatersrand, Johannesburg. The researcher was then provided with a research protocol number: 2016ECE058M (Appendix A) to proceed with the study. The next step of this process involved an application to the GDE to obtain permission to conduct research in schools. The researcher was issued with a Research Approval Letter (Appendix B) to collect data from selected participants in the three schools. The four pillars of ethics were considered in the study:

- **Informed consent:** This implied that the participants had the right to know that they were being researched for the study. They were formally informed about the nature and purpose of the research. The participants were first invited to an information session (Appendix C) with the researcher explaining what the study would entail and they were asked to reflect on whether they were interested in being active participants of the study. All participants were briefed about what will be required of them during their participation and once they agreed they were given the consent forms to sign (Appendix E). The participants were informed that their identities will be protected at all times as well as how the data results will be analysed and used.
- **Collecting data from participants:** Participants were told that the data collected from them would not harm them in any way. Their physical and psychological needs would be accommodated at all times and their identities and sensitive information would be protected by the researcher (du Plooy-Cilliers et al., 2014).

The participants were assured that all interviews and questionnaires would be administered and completed in private at their own convenience. There would be no research assistant except for the researcher. Permission was sought from the participants for the use of a voice recorder, which was not an obligation. The participants were guaranteed that the researcher would protect all gathered information about the topic.

- Confidentiality: From the outset of the study the participants were assured that confidentiality would be maintained at all times. This meant that all identities, school names, places and the location of the research would not be disclosed without the permission of the participants. The information gathered from the participants was to be used solely for the purpose of the research study. The only person other than the researcher who would have access to the data, would be the supervisor at the University of the Witwatersrand and the data would be stored in a locked cupboard in the supervisor's office and would remain the property of the university for five years after which it would be destroyed by shredding (Appendix C and D).
- Avoiding harm: Although it stands to reason that the participants would be protected at all costs, the researcher reiterated that no harm would come to them during the data collection process. This included emotional, physical or any other form of harm, hurt or abuse. The researcher would be sensitive to all these issues and take into account individual participant needs.
- Right to withdraw: The participants were informed that their participation was purely voluntary, and they had the right to withdraw at any time during the study without any penalty or obligation. They were told that if they felt uncomfortable they could withdraw and this would not impact on them or their status at all. The researcher provided assurance to the participants that the outcome of the research would not be harmful or affect them or their jobs in any way (du Plooy-Cilliers et al., 2014).

The researcher followed all the above-mentioned ethical procedures and professional standards that are necessary for conducting the study in a responsible, trustworthy and respectful manner. Therefore the researcher had full co-operation from all participants. The participants voluntarily consented to the use of the voice recorder for the interviews and were enthusiastic to complete the questionnaires as accurately as possible. The research data collection did not impact on teaching and learning time and individual participants personal requests were respected. The data collection for this study went off extremely well and as promised the study will be made available to those participants who are interested in the outcome of the research.

### **3.12. Researcher Positionality and Bias control**

Reflecting on subjectivity in the research study, I positioned myself as an, Indian women with many years of experience in the F. P. pursuing a Master's Degree. Having many strong attributes, beliefs and skills, I fully understood that I could not only be defined by these qualities. During this research process the researcher faced a slight struggle with two positions. The researcher grappled with positionality as a researcher and its responsibilities as well as being F. P. HoD. My position as HoD influenced and had a positive effect on my position as a researcher. For many participants I was an insider as well as an outsider and this could have created issues with trustworthiness but the participants saw this as a positive step as I could fully understand their roles as HoDs (Hammersley, 1993).

The researcher's position as HoD played a significant role in analysing the data collected, and thus made it easier to understand the role of the HoD as instructional leader in the F. P. Reflecting on the relationship the researcher shared as HoD with the participants, she could easily identify with their daily struggles thus capturing their responses to the questions adequately. Positionality in the research was a useful construct, as it illuminated the careful, much needed data collected from the participants to produce reliable results (Holmes, 2014). Reflecting on the research strategies, the researcher realised that unconsciously she shared the same academic language and mannerisms as the participants as an insider and this made acceptance and trustworthiness easier providing a full picture of what she was trying to understand. Throughout the research process, the researcher's

positionality and reflexivity was constantly changing based on the context and situation the research assumed.

Selection bias was controlled by the researcher choosing schools that were unfamiliar. Three different schools based on various contexts were selected for the study (township, suburban and inner city). The participants were unknown to the researcher. All principals, HoDs and teachers were administered the same interview questions and questionnaires. The results were audio-taped in the same manner, using the Atlas ti programme (Collier & Mahoney, 1996). The researcher was present during the interviews and completion of the questionnaires to control any bias that might occur. In this way reliability, credibility and trustworthiness of the participants was gained by the researcher (Golafshani, 2003).

### **3.13. Pilot study**

The writers, Du Plooy-Cilliers et al. (2014) state that pilot studies also referred to as feasibility studies are a small version of the real research report. A pilot study was conducted before the actual research in order to gain in-depth background knowledge of the topic. The questionnaires were first administered to one teacher in each grade in the researcher's school. This mini study was used to pre-test data collection instruments drawn from a small sample of the actual population that the researcher intended to use which led to increasing the validity and reliability of the study. These participants were not the participants from the actual sample of the intended population. The pilot study provided a warning sign of possible errors, difficulties or problems related to the instruments that the researcher intended using for the actual study. After conducting the pilot study the researcher was aware of what items on the instrument needed modification based on the feedback from the study. The pilot study ensured that the content of the study, the terminology and questions were commonly understood by the participants.

The researcher used the pilot study to edit and eliminate any unforeseen problems that appeared when designing the instrument (du Plooy-Cilliers et al., 2014). The data obtained from the pre-test study will not be used in this report but was useful in correcting the errors discovered on the research instruments. Once the pilot study was completed the data collection process continued and the results of the actual process are used in the analysis and interpretation of this study.

### **3.14. Conclusion**

This chapter discussed the dominant paradigms used in research design. An explanation of the adopted paradigm is presented. The importance of ethical issues were considered and managed in a sincere and confidential manner, in the form of consent letters. Information letters were drafted before interviews and questionnaires were designed and compiled and sent to participants informing them of the nature, aims and objectives of the study. Issues of confidentiality and anonymity were discussed and the reason for the pilot study was provided.

The next chapter presents the data collected and also provides an interpretation of it and a final analysis.

## **CHAPTER 4: DATA PRESENTATION AND ANALYSIS**

### **4. Introduction**

This chapter presents and analyses the data collected from the participants on the role of the F. P. HoD as instructional leader and provides the essential characteristics of instructional leadership using the perceptions of staff members in three primary schools. Carefully drawn from the data were the challenges faced by F. P. HoDs which hindered them implementing instructional practices and skills to improve learner achievement in their schools. Themes and sub-themes emerged from data collected from the fifteen participants in School 1, School 2 and School 3 altogether. In the presentation and analysis of the data, Principal 1, 2, 3 refers to school leadership at the level of the principal; F. P. HoD 1, 2, 3 represents leadership at the level of the middle manager; and T1, T2, T3 represents leadership at the level of teachers.

Data will be presented and analysed according to the main research question and sub-questions set out in Chapter One. Out of the three schools that participated in the research study, two schools fall under District D9 (JE) and one school under District D10 (JC).

Out of the interviews and questionnaires emerged common themes that are discussed below and reinforced with pertinent and appropriate quotes from the interviews and questionnaires.

#### **4.1. The theory that underpinned the analysis decisions**

This study, based on the interpretive research paradigm utilised the qualitative analytical method to analyse the data. A thematic and content based approach which is the foundation of qualitative research was used as a method as it is flexible (Braun & Clark, 2006). As the data collected was analysed using a computer generated programme, common themes were highlighted and the content of the interview questions and questionnaires were categorised according to these important themes. According to Braun and Clark (2006), thematic analysis is a method that identifies, analyses and reports patterns or themes within data collected in the study.

As there is no clear idea about how to use thematic analysis, the researcher decided that a computer generated programme would be effective in assisting to analyse the rich data

according to the content gained by categorising it into common themes that emerged. Throughout the data collection process the interviewer could see that themes and patterns were firmly fixed in the content from the participants responses. Thematic analysis provided the researcher with a more accessible form of analysing the data and therefore was a suitable form of analyses as it can be used within many theoretical frameworks (Braun & Clark, 2006). Themes assisted the researcher to capture important data which related directly to the research questions of the study and gave the data content a meaningful pattern. The researcher used educational judgement to determine what the important themes were and this added value and flexibility to the overall research question (Braun & Clark, 2006).

#### **4.2. The Interviews – Principals 1, 2, and 3 (School 1, 2, and 3)**

##### **Theme 1: Understanding of the concept of ‘instructional leadership’**

All three principals understood the concept ‘instructional leadership’ and were able to explain the term partially providing examples to describe their conceptual knowledge.

##### **Principal 1:**

Principal 1 had a fair knowledge of the concept but failed to include teachers as part of the instructional leadership practice. She only referred to developing the child and not the teachers.

She placed emphasis on the curriculum and indicated that instructional leadership was to ensure that the curriculum was delivered. For principal 1, instructional leadership was teaching whereby instructions were given for the curriculum to be delivered and this would be done with a caring approach.

*“Well instructional to me is basically teaching so instructing is teaching, so for me that leadership would be to ensure that the curriculum happens, and again, what do we see as curriculum, it’s not only content based, it’s to ensure that we develop the child as a whole, so how do we approach it, with a caring approach”.*

##### **Principal 2:**

Principal 2 indicated that the concept of instructional leadership is leadership where you lead and simultaneously provide instructions or give directions to people as to where they

should go. His understanding of the concept was leadership in which you make people follow you. He felt that he would instruct people to achieve goals within a timeframe.

*“Instructional leadership – was defined as “providing instruction and telling teachers and other stakeholders what should be done, leading by instructing others, giving direction, having a goal orientated framework”. Leading others in the right direction, while allowing them to grow and develop so that their can fulfil the goals of the curriculum.”*

### **Principal 3:**

For principal 3, instructional leadership involved the leader being able to manage the curriculum, monitor the delivery of the curriculum and setting goals. She felt this included allocating resources, but more important for her was to evaluate teachers regularly to ensure that learners were achieving quality results.

*“It means when a leader, is able to manage curriculum, monitor lesson plans that they are in line with the management plans, curriculum statements, one needs to set a goal, so maybe able to allocate resources, but most importantly evaluate educators regularly to ensure that learners achieve quality results, quality is very important.”*

### **Theme 2: Adequate communication**

All three principals agreed that adequate communication was essential to the role of leading and managing the curriculum, especially for the leadership within the school. Communication included engaging in ongoing conversations with teachers, learners, parents and other stakeholders to build a culture of collaboration in the school environment. Together with having adequate communication is the notion of collaborating with each other to form a community of learners which improves learner performance and achievement. The following quotes are taken from the three interviews with the principals:

### **Principal 1:**

*“Goals are continuously communicated to staff, learners and parents, at meetings, assemblies, and policies.”*

### **Principal 2:**

*“I actually believe in collective management, I’d love the inputs of each and every stakeholder. I have that kind of buy-in from all stakeholders, meaning teachers and parents.”*

**Principal 3:**

*“I feel communication is the key. Open communication with parents, teachers, learners and stakeholders at large plays a very tremendous role.”*

**Theme 3: Structured method of control**

The three principals pointed out that the SMT had to have systems and structures in place to support, guide and encourage reflective teaching and learning. As principals they had to work together with the management teams to coordinate, supervise and evaluate curriculum instruction. Having a structured method of control allowed the principal and SMT to monitor learner progress and provide incentives for learning. The principals were responsible for setting up study teams, building trust and empowering teachers by supporting personal development. Closely tied to this theme is the concept of delegation and allowing teachers autonomy to lead and manage the curriculum in the classroom. In doing so teachers felt that they were valued and had equality which gave them a voice to solve problems and share in the decision making progress. The following quotes were drawn from the three interviews with the three principals:

**Principal 1:**

*“I have a sense of where we at. Everything that gets printed, whatever gets printed has to come to me first. So I check it.”*

**Principal 2:**

*“We have got regular class visits. And then we do have, we’ve developed some templates, uhh, which help us, to monitor the curriculum itself.”*

**Principal 3:**

*“Most importantly evaluate educators regularly to ensure that learners achieve quality results, quality is very important.”*

#### **Theme 4: Internal staff-support system**

Principals felt that by having a structured method of control, they were able to protect instructional time, maintain high visibility and provide coaching, mentoring and guidance in support of teaching and learning. SMTs in all three schools do not work in isolation but rely heavily on subject heads and grade leaders to collaborate and support each other within the school and classroom environment. Principal 1 mentioned that teachers were allowed to go to the higher grades in the Intersen Senior phases if they needed to gain more knowledge and watch lessons being taught. Internal staff support is an important theme and principals, HoDs and teachers in all three schools felt that teaching and learning would not be the same if they did not have the support and guidance of their colleagues and peers. Relating to this theme is external staff support. Principal 2 felt that by receiving support from a Non-Governmental Organisation (NGO) the school positively assisted teachers to develop language skills as the school had decided to use English as the Language of Teaching and Learning (LOLT).

The Principal of school 1 mentioned that her teachers sometimes got the necessary support from teacher organisations which helped with individual teacher related curriculum matters. Internal staff support for many principals included providing teachers, learners and parents with systematic, formal and non-formal feedback during the academic term. This leads to fostering teacher reflection, therefore providing teachers with motivation to engage in collegiality among staff members. The interaction between leaders and followers in the school environment is extremely important and results in a collective practice of teaching and learning. The following quotes are useful to understand the principal's views.

##### **Principal 1:**

*“Very much reliant obviously on my SMT, with respect the HoDs do the random checks; they also have their normal book control. We trust everyone but we still need to monitor.”*

*“Teachers invite me to watch lessons.”*

##### **Principal 2:**

*“I check as to whether, how far the teacher is, maybe, and to interact and find out what challenges that teacher is coming across.”*

*“Reports go to the deputy principal and then we sit around and if there are challenges and then we try to iron them out, depending on, on those challenges.”*

**Principal 3:**

*“I’m involved in approving the preparation of lessons for deputy principals. I moderate the exams and assessment tasks and I also do their book control. I check that teachers are in line with their year plans”.*

**Theme 5: Instructional leadership practices:**

Principal 1, 2, and 3 engaged in ongoing instructional leadership practices on a daily basis as they led and managed their schools towards reaching its goals, vision and mission. These instructional practices involved ***maintaining high visibility by walking around the school and visiting classrooms and engaging with curriculum issues***. This is important as many principals in South African schools are engaged in many administrative tasks and barely have time for instructional practices. Principal 1 goes beyond her duties by scrutinising every worksheet before it is given to learners. This helps her to gain insight into the content matter being taught by her teachers in each grade.

***Empowering teachers to become lifelong learners*** was the next instructional practice that was common in all three schools. The principals felt strongly that self-development played an important role in helping teachers grow and develop their skills, knowledge, values and attitudes and this positively impacted on their classroom practice. These teachers then developed the courage to coach and mentor their peers in classroom instruction.

***Reflective practice*** is a sub theme that principals related to instructional practice. All three principals felt strongly about teacher reflective practices especially when it came to using the analysis of learner results for improvement. Principals encouraged teachers to reflect on their daily tasks offer strategies to improve learner performance. Self-reflective practices help to enhance learner performance and principals mentioned that they engaged in self-reflection daily to determine how they can improve their roles as leaders and provide support to their staff to model good behaviour.

**Principal 1:**

*“I view instructional as positive but most importantly it has to come from me. So me as role model, I’ve gotta be positive, I’ve gotta be enthusiastic, motivated, and I find it’s a ripple effect. So the teachers have the same, the kids have the same; we always referred to as a happy school.”*

**Principal 2:**

*“I decided to approach READ. It used to supply us with materials and sort of give us guidance as to how you can teach children to read and write.”*

**Principal 3:**

*“Teachers regard development you know as initiated by the school as an incentive. By using data for example, like comparing grades with another grade or neighbouring schools for that matter to assist in improving learner results as well. So data helps with diagnostic intervention strategies. So there are support groups, remedial actions or extra classes.”*

**Theme 6: Going beyond the curriculum**

This theme is related to the themes mentioned above and featured strongly among the three principals. They felt that being accountable for all that occurs in an educational environment demands great effort and responsibility by them. This requires them to go beyond the curriculum and provide support to individual teachers as they need it.

For Principal 2, it meant engaging the community to assist him to overcome issues like late coming, absenteeism, voluntary work and helping with menial tasks around the school. This required the principal to get out of his comfort zone and recruit community helpers. This worked well for School 2 and the principal got the support of the community which makes his task easier. For the three principals, going beyond the curriculum meant supporting staff with problems that were not only curriculum related, but with personal and private matters. The following quotes were drawn from the interviews with the principals.

**Principal 1:**

*“But over and above the curriculum three Rs, like life skills for me, are very important okay. It doesn’t help you to read and write if you sitting in jail. Educating the child as a*

*whole is important. Curriculum is not only content based, it's to ensure we develop the child as a whole".*

**Principal 2:**

*"I use the community. We sell ourselves and show them the importance... of a school, in and around them. They take ownership of the school, even when I'm not around".*

**Principal 3:**

*"If there are personal clashes between teachers we resolve them as soon as possible because it can't be always curriculum related."*

*"Absenteeism is a problem. I actually do have like parents who are willing to volunteer and then some are qualified teachers who stand in a class."*

**4.3. The Interviews – HoDs 1, 2, and 3 (School 1, 2, and 3)**

The F. P. HoDs in the three schools offered their responses to the concept of instructional leadership. The following common themes emerged from the HoD interviews:

**Theme 1: Understanding of the concept of 'instructional leadership'**

The HoDs in the three schools had a simple understanding of the concept of instructional leadership. Although they are all engaged in instructional leadership practices daily,

as indicated during their interviews, they are totally unaware of the impact they make to the teaching and learning in their schools. They see it as a role that they are expected to play as HoD. All three HoDs engage in class teaching and are form class teachers. This makes performing their instructional roles a challenge.

**HoD 1:**

*"I think, so being a leader, being a manager, and just constantly giving the correct instructions and making sure that your staff are aware of what's going on."*

**HoD 2:**

*“I think instructional leadership means the instruction that I give to my team. Not only the curriculum, everything that concerns the child, the parent, the school as a whole.”*

**HoD 3:**

*“Instructional leadership includes management and leadership functions that influence school activities.”*

**Theme 2: The F. P. HoDs offer their responses to the main role of the HoD as an instructional leader**

The HoDs in the three schools had a somewhat clear understanding of their main roles as instructional leaders in the F.P. The strong message that resulted from this question was that the main focus for all three HoDs was the effective delivery of the curriculum to ensure that successful teaching and learning took place. Other important factors such as communication, transparency, teamwork and completion of tasks were important roles that also had to be fulfilled. Moderation of the curriculum was a role that was seen as a main activity for the HoDs.

**HoD 1:**

*“Keeping your staff informed, so being transparent is very important, and if there’s an issue dealing with it.”*

**HoD 2:**

*“It’s to help my team, I have to help them, I have to workshop them, I have to make sure the F. P. is working, the children are being taught.”*

**HoD 3:**

*“To make sure all work is done, teaching is effective, and also I’m a decision maker. I make sure that my department has every requirement.”*

**Theme 3: Leading and managing the curriculum**

This theme was more important to the HoDs in School 1 and School 3 than in School 2. The HoDs felt that many of their roles and responsibilities involved leading teachers and learners in the right direction so that the goals of the curriculum could be reached. The F. P. HoD in School 2 is a new appointment so perhaps she is still finding her way through

the job and has admitted that it is taking her time to implement structures in her new environment. She also felt it was important and tried her best to manage the curriculum to improve learner performance.

**HoD 1:**

*“I do pre-moderation, so that is an ongoing checking of what’s going on, what they are teaching, what they are covering. I do book checks, write a brief report and make sure that CAPS is being followed”.*

**HoD 2:**

*“We have curriculum coverage reports; we have two cycles in a term, so the teacher will write that report, I’ll go and verify if the teacher has covered the areas that she was supposed to cover. If not I make sure that she writes how she is going to cover the curriculum.”*

**HoD 3:**

*“I check, I moderate if the worksheets are on par with the lesson plans and if I’m not happy I call the teacher and discuss how she can reduce or add”.*

**Theme 4: Effective communication and collaboration**

HoDs in all three schools indicated that this theme played a major role in the daily leading and managing of the curriculum with staff and stakeholders. This theme is the key that unlocks information that is needed to hold the school together. Effective communication and collaboration allows teachers to share information, which is guided by the SMT and then passed onto the learners and parents. The HoDs effective communication and collaboration helped to lead and manage the successful delivery of the curriculum. Planning and preparation in all three schools involved the HoD communicating school goals to all stakeholders. HoDs in each school had different strategies of communication. In School 1 the HoD had meetings and used a communication book. In School 2 the HoD was guided by the principal and deputy and then instructions were given to teachers. In School 3 the HoD had meetings which were used to communicate important information regarding teaching and learning.

**HoD 1:**

*“Communication as I say I have those weekly meetings, so once a week the F. P. teachers meet and we discuss whatever, new business like new things that have happened, what are our needs, what we are finding. I think we are in touch with each other”.*

**HoD 2:**

*“I have a communication book where I write a note to teachers to come to my class so we can meet, especially when we are coming from the Professional Learning Groups (PLGs)”.*

**HoD 3:**

*“I’m very fortunate, my teachers, we communicate often. I’ve got meetings with them and if they have problems maybe with the office ladies, they will come to me, so we assist, so we communicate”.*

**Theme 5: Supporting the growth and development of staff**

In School 1 and 2 this theme was an important part of the HoDs role in leading and managing the staff and curriculum. The HoDs felt that by communicating and collaborating with staff often, and providing support on curriculum matters, teachers had the opportunity to develop and grow their knowledge and skills. This then assisted teachers to deliver the curriculum to learners in a successful manner that would improve school results. The HoD in School 3 did not feel that this was her main role, as the staff in this school is divided between two teacher unions, SADTU and NAPTOSA. The teachers in this school believed that if they went on a course or workshop to develop their knowledge and skills they did not want to share it with the others. They preferred to keep their skills and knowledge for their own benefit and sharing important information with others was not a priority.

**HoD 1:**

*“It’s often based on our needs, we chat in meetings, discover how we feeling, the same way, we all having the same issues, let’s see if we can have some sort of development. Our staff go one those NAPTOSA courses all the time. As a school we do a lot of staff development and ideas come from all staff members.”*

**HoD 2:**

*“I must start by developing teachers here at home. If we have a problem then we consult our PLC chairperson and we ask for help. We also have teacher development programmes that we attend”.*

**HoD 3:**

*“I just give them a form for our IQMS where the teachers will be writing that they need to be developed and then we work on that and then if I feel that maybe it’s not enough I also consult my deputy to come in and we assist the teachers.”*

**Theme 6: Supports guides and encourages reflective teaching and learning**

HoDs in School 1, 2 and 3 mentioned that supporting teachers and learners to achieve a high standard was one of the main roles of the instructional leader. All three HoDs encouraged their teachers and learners to work hard, communicated school goals and collaborated with each other if they needed assistance. The Integrated Quality Management System (IQMS) was a normal part of the school year for all three HoDs. They believed that their role as leader was to visit the classroom, empower teachers, monitor classroom instruction and provide incentives for learning.

**HoD 1:**

*“I mentor them during that half hour once a week, and weekly prep meetings, so we do working very much in line with CAPS. They are encouraged to go and watch someone teach.”*

**HoD 2:**

*“When school starts they must write their annual teaching plan, planning and prep is done in advance. I have a file, checklist where I check their files. So those are the tools I use.”*

**HoD 3:**

*“They got record books and then once a month I request the record books to check if marks have been recorded.”*

**Theme 7: Monitoring classroom instruction**

The information provided by the HoDs shows that their instructional role included monitoring classroom instruction and evaluating teacher's performance. HoDs believed that collegiality with staff members assisted them to monitor the curriculum in the classroom. This role of the HoD as leader of the F. P. was important as it provided them with vital information about the delivery of the curriculum, the assessment tasks, the summary statistics and other relevant information about the teacher and learner. This helped the HoD to provide guidance, supervise and evaluate the work being done in the classroom environment.

**HoD 1:**

*"I try my best to do it once a term, but it very often doesn't happen. Looking at the kid's books you can see so much about the teacher, you can see if their instructions are clear, you can see if they trying to instil a positive work ethic in children."*

**HoD 2:**

*"I don't monitor all the teachers at the same time; I select teachers, especially those that give me problems, those that want to verify that they on the right track."*

**HoD 3:**

*"I call a meeting, and say how we can improve on this point, that point so that we can get good results. We need to work as a team, so that's my feedback to them."*

**4.4. The Teachers Questionnaires – Teachers (School 1, 2, and 3, Grade 1, 2 and 3)**

The main aim of administering questionnaires to one teacher in each Grade in School 1, 2, and 3 was to investigate the key roles of their HoD as instructional leader. The researcher analysed the themes according to each school and not each teacher as common themes emerged from teachers teaching in the same schools.

**The following common themes emerged from the questionnaires with the teacher participants of the three different schools.**

**School 1:**

### **Theme 1: Understanding of the role of the HoD as an instructional leader**

The teachers in Grade1, 2 and 3 all understood what the role of the instructional leader entailed. Their comment was that the HoD is someone who guides and leads the staff through every aspect of teaching. They saw the HoD as someone who set standards in both teaching and learning and expected teachers to reach their full potential so that learners received the best possible education.

*“An instructional leader sets standards expected in both teaching and learning, giving clear set out goals for educators to reach their full potential in order to give learners the best possible education.”*

### **Theme 2: Good planning and guidance given by the HoD**

The teachers in School 1 indicated that the HoDs role was to ensure that planning took place regularly to ensure effective delivery of the curriculum. The HoD played a major role in providing guidance and direction to lead and manage the curriculum.

*“Our HoD checks the books of children, to assess if the standard of learning is meeting learner needs.”*

### **Theme 3: Importance of communication and collaboration**

This aspect of leadership and management in School 1 was emphasised often. The teachers believed that all instructional concerns were addressed with effective communication and proper collaboration. This allowed them to tackle any curriculum and assessment related issues they faced.

*“Foundation Phase meetings, where regular feedback with regards to the on goings of the school, grade or phase are held and feedback from the cluster, HoD meetings are given during this time.”*

### **Theme 4: Development of individual teacher’s performance to ensure further growth and development**

The use of the IQMS in this School 1 played an important role in addressing the individual needs of the teachers. The principal’s suggestion of teachers visiting other classes to watch lessons assisted especially new teachers and motivated and inspired them to gain further knowledge to grow and develop their teaching methods to improve learner results.

*“We do IQMS every year, where the teacher is assessed holistically. Recommendations are given for further growth”.*

#### **Theme 5: Monitoring and providing regular feedback**

The teachers in School 1 stressed the important role of the HoD in monitoring their work and providing regular feedback during meetings, personal support sessions and written reports. They felt that regular feedback to parents and learners formed part of the effective delivery of the curriculum when trying to improve overall school results.

*“She meets with each teacher at least once a term, discussing learners needing support, as well as possible retentions. She offers advice on how to deal with parents who are difficult, or if need be, sit in on our meetings with them.”*

#### **School 2:**

#### **Theme 1: Understanding of the role of the HoD as an instructional leader**

The educators who participated in the research study in School 2 understood the role of the HoD as instructional leader and considered their HoD as an effective instructional leader.

*“A leader who sets clear goals when planning, a leader who promotes unity, a leader who manages the curriculum effectively”.*

#### **Theme 2: Setting goals and motivating staff**

The teachers felt that their HoD was an instructional leader as she set clear goals and motivated them and the learners to achieve success. They believed that goals were drawn up taking into account their views and suggestions. Their leader was a strong commander of the curriculum and promoted teamwork. They would always sit together and sort out curriculum issues that affected the teaching and learning process. The teachers agreed that motivation played a big role in the leader helping them understand things and she went even further by demonstrating to assist them to reach their goals.

*“She is a leader who sets clear goals and promotes unity. She also listens to our views and demonstrates first”.*

### **Theme 3: Communication, teamwork and sharing ideas**

All three teachers indicated that their HoD was an instructional leader because she communicated well during meetings and had a communication book which was used to inform them of important curriculum matters. This book was rotated to the F. P. teachers at least once a week to assist them to keep informed of new developments or simply to inform them of important information pertaining to teaching and learning.

*“She always has phase meetings. A communication book rotates to our classes by our HoD once per week, by sending a memorandum.”*

### **Theme 4: Effective monitoring and controlling of the curriculum regularly**

Teachers in School 2 felt that their HoD was a good leader because she used meetings and class visits to monitor and evaluate curriculum coverage. Regular class visits, support and Learner Teacher Support Material (LTSM) is used, as well as evaluating the curriculum which is an ongoing process as it provided the HoD and teachers with an idea as to their performance and learner progress.

*“HoD has the right to audit all foundation phase work.” Strategies and materials are implemented to the learners. She uses intervention strategies, curriculum differentiation for those who are not achieving; they are referred to the Learner Support Educator”.*

### **Theme 5: Internal staff-support system**

This theme was common among all three teachers. The HoD and the F. P. team provided each other with the necessary assistance they needed to effectively deliver the curriculum.

*“She gives us a lesson plan which will develop us on the area concerned. She gives us support material and also provides us with new things in the curriculum”.*

*“She calls an educator who specialises with the area where I’m struggling to help me.”*

The teachers felt that their HoD was definitely an instructional leader as she supported them in many different ways. The support within the school played an important role to them and they had the confidence to work with the curriculum to improve teaching and learning.

*“If one educator understands something better she will be asked to explain to us. If one has something that can benefit the learners we take that.”*

The comments above provided by teachers in School 2 clearly indicate that internal staff support is an important role of the instructional leader and is used to assist teachers understand and implement the curriculum more effectively.

### **School 3:**

#### **Theme 1: Understanding of the role of the HoD as an instructional leader**

After analysing the questionnaires from the three teachers in School 3, the following common themes emerged:

All the teachers had a fairly good notion of the term instructional leadership but only two classified their HoD as an instructional leader who set clear goals and managed the curriculum well. The third teacher said she did not consider the HoD an instructional leader.

*“It’s a leader who manages, promotes and supports effective learning and teaching in her/his school, promotes a positive climate for set goals to be achieved”.*

*“She lacks skills and knowledge of curriculum expectation and implications which is the biggest challenge in the education system.”*

#### **Theme 2: Promotion of a positive learning climate for the achievement of set goals**

Two teachers indicated that their HoD was an instructional leader as she promoted a positive learning climate so that success could be achieved within the school. The Grade 1 teacher did not see the HoD as an instructional leader. The grade 1 teacher felt the HoD did not promote the exchange of ideas among teachers but they communicated.

*“She sets clear goals and manages the curriculum and evaluates the teachers to promote learning and growth. She does not communicate well. However among teachers we do communicate.”*

#### **Theme 3: Promotes and supports effective teaching and learning**

Two teachers agreed that the HoD worked hard to promote and support teaching and learning. The third teacher felt that the HoD lacked the skills and knowledge of curriculum

expectation and implementation. This perception of the HoD was in direct conflict with the other two perceptions.

*“She is a leader who manages, promotes effective teaching and learning.”*

*“She lacks skills and knowledge of the curriculum.”*

#### **Theme 4: Necessity of pedagogical knowledge for HoDs**

The teachers in School 3 felt that it was important for the HoD to have pedagogical knowledge so that she would be able to assist, monitor and evaluate teachers and the curriculum.

*“The HoD will have better problem solving skills if she has pedagogical knowledge. The HoD must have the knowledge of classroom management.”*

By having pedagogical knowledge the HoD would be able to assist and support teachers and learners in a diverse number of ways. All the teachers in School 3 stressed the importance of this theme. In school 3 the new teachers felt they needed to further develop themselves.

#### **Theme 5: Evaluates curriculum and suggests changes**

This theme was important and the teachers felt that proper evaluation and monitoring of the curriculum was an important task of the HoD.

*“Through book control, she is able to see how we are working in class. Class visits where she can see how teaching and learning is conducted.”*

The third teacher felt that although evaluation was done, not much assistance was given to teachers in terms of the curriculum and many learner needs were not met, especially those who experienced barriers to learning. She felt that authoritarian methods were being used to get teachers to meet deadlines. She considered this to be intimidating.

*“No assistance given to teachers. Intimidation and authoritarian leadership is used to meet deadlines.”*

#### **4.5. Challenges faced by HoDs that hinder their roles as instructional leaders**

#### 4.5.1. Principal 1's perceptions: (School 1)

*"I think what's, difficult is that they have a full timetable."*

The principal indicated that the **HoD teaching a full timetable and a form class** was a huge challenge as she needed to be in class teaching and was therefore limited with time. The HoD had to teach a class and be responsible for eleven to twelve other classes as well as teachers; this was a tremendous task that was quite difficult to manage.

*"Your people who don't get on with one another and that, that actually add a burden to them, so it leads to exhaustion and feeling demotivated."*

The second challenge mentioned was that there was **a conflict of interest between the teachers**, where some teachers did not get along with others and this caused much exhaustion, demotivation and stress on the HoD. This impacted on the role of the instructional leader and her ability to perform her duties well.

#### **How do you assist the HoD to overcome these challenges?**

*"Well, loads of listening, being the shoulder, trying to give as much advice as possible."*

Principal 1 felt that being a good listener, being sympathetic, lending a shoulder to cry on and giving support and advice helped to ease the workload and challenges of the HoD. She believed that everyone in the school had a role to play in tasks and that workload distributed among staff made the process much easier.

*"I am happy to help with anything, you know they say it's not your job, it is my job, it's everybody's job, we here to help one another, and it doesn't matter."*

Principal 1 stated clearly that she was there to assist all her staff. She stayed till 18h00 every day checking all worksheets before printing. She left school late as she preferred to stay and complete all administrative tasks before the day ended. She started the day with e-mails to all staff early every morning so that they were aware of the events for each day.

#### **Principal 2's perceptions: (School 2)**

*“I think the biggest challenge is it’s too much paperwork”. There’s quite a lot of things to be completed to an extent that uhh I think that the element of teaching and learning seems to be lost”.*

The principal of school 2 felt that **the large amount of administrative tasks** that HoDs need to complete hinders the actual teaching and learning process. He felt this took up the instructional time of the HoD and hindered the effective delivery of the curriculum.

*“Another challenge would be perhaps maybe the level of respect for HoDs”.*

A second challenge that the principal mentioned was **the level of respect for the F. P. HoD**. Although they did not experience this disrespect in their school he felt that HoDs should be equipped with skills to lead and manage teachers so that they can get the desired results.

*“Uhm, with HoDs, I think it’s the relationship between them and the District, and the teachers”.*

A further challenge outlined by principal 2 was **the bypassing of the HoD by the District Office** to get to the teachers. This caused a problem between the teachers and HoD as the HoD was not informed but is ultimately responsible for non-submissions and is accountable for non-compliance with the District’s policy. This lack of proper communication caused problems and is a challenge for the F. P. HoD who has to bear the brunt of any irresponsible action.

*“Another challenge is the workload, the workload of the HoD; I think it’s too much”.*

**The heavy workload of the HoD** was the last challenge that Principal 2 highlighted. He felt that HoDs should have the least number of teaching lessons, so that they will have ample time to manage other important matters regarding the curriculum. He stated that HoDs having to teach eighty five percent of the time was too much and as such left them with insufficient time for monitoring and evaluating the curriculum. When the HoD had to monitor and evaluate the class teaching of teachers in the phase, there was no help available to teach her class. Therefore learners were being disadvantaged by not gaining the full attention of their teacher who had several other tasks to perform.

**How do you assist the HoD to overcome these challenges?**

*“I always like this uhh; young people who come and say they want to volunteer”.*

This principal uses past learners or community helpers who are knowledgeable to assist the HoD with her workload. They go into her class and work under her guidance while she goes out to assist teachers in her phase. This allows the HoD some free time to perform her monitoring and evaluating responsibilities towards the teachers in her phase. Principal 2 assists his HoD by implementing subject teaching in the grade 3 areas. He has proposed that the HoD get the least lessons to teach so that she is able to perform her instructional role easier. He concluded that when he mentioned subject teaching the teachers were in agreement as they work collectively to ensure effective delivery of the curriculum by relieving the HoD of some of her teaching responsibilities.

### **Principal 3’s perceptions: (School 3)**

*“Mmm, teacher absenteeism, that I find it to be a big challenge, especially for F.P. They are classroom based”.*

The principal in School 3 felt that **teacher absenteeism** impacted negatively on the HoD as she had to find ways of handling the situation because they did not have the financial resources to employ substitutes.

*“For me it was a matter of not having administration time. The HoD F. P. that’s where the challenge is because of uhm, administration is done, you know, at ...”*

The principal of School 3 also highlighted that instructional time was being hindered due to the **HoD not having enough administrative time to complete tasks as they had a class to teach**. This left very little time for other important tasks in the phase.

### **How do you assist the HoD to overcome these challenges?**

*“I guess as principal I call individuals to make them aware that their absenteeism is really impacting on the learner”.*

Regarding the absenteeism of teachers the principal of School 3 felt that District intervention was needed to monitor the ‘leave’ system. As principal she met with the relevant teachers to make them aware that their frequent absenteeism was impacting negatively on the teaching and learning process.

*“I tackle the issue, not the person.”*

Personality clashes are dealt with by the principal who calls in the teachers concerned and sorts out the issues immediately. The principal also brings in the need to follow policy if teachers complain about the HoD and the workload. She uses policy implementation to motivate teachers to complete tasks. She supports the HoD by intervening and uses the policy documents to strengthen her argument. She gets teachers involved by saying that it's about what a person wants done, it's all about following policy.

#### **4.5.2. Challenges faced by HoDs that hinder their roles as instructional leaders**

##### **HoD 1's perceptions (School 1)**

*“Time is my biggest thing. I want to give so much to my own class but then I've got so much additional work.”*

The HoD in School 1 felt that the **workload and the time factor** was a big challenge for her in her role as an instructional leader. She felt that due to the amount of work that the HoD was expected to do, she had very little time for her own form class. She indicated that the end of every term was particularly stressful for her as the workload increased. The HoD felt that she should have an easier timetable than the teachers due to the amount of administrative tasks that was required to be done by her.

*“The other challenge is, as I say the young staff and their very, very big resistance to change, they like things the way they like to do them and they do not like to be told”.*

The second challenge that she faced was **dealing with younger teachers and their indifference** to change. She indicated that she doesn't force anything onto them but uses positive means to show them that it's really a good idea to try to consider it. If they feel that they don't want to try something then she allows them to justify reasons for not wanting to change or try something new.

##### **HoD 2's perceptions (School 2)**

*“My biggest challenge it's my class being left behind because of me doing office work, me going to classes to monitor. If I had an assistant I think everything will be going well.”*

The HoD in School 2 felt that administrative duties impacted negatively on teaching her own class. Although much of the administration work was done at home she felt that she faced pressure in many ways with things that could only be completed at school. She added that this could be overcome by speaking to the deputy principal who would then take up the suggestion of an assistant to the level of the principal. She will then get assistance from her principal.

### **HoD 3's perceptions (School 3)**

*"I am very poor in managing my admin work, my marking, like I don't manage to do my filing."*

The HoD in School 3 felt **that her own class administrative duties, like marking and filing were a challenge for her**. She only had time to teach her class but did not have ample time to mark the work. She indicated that she tried very hard to mark the core subjects like English, Maths and Afrikaans but fell through in Life Skills. She suggested that this challenge could be overcome if the school employed an assistant to help her with her class duties. She mentioned that learners were missing instructional time due to her being out of class for long periods.

*"It's the large number and yeah so far it's large numbers."*

The second biggest challenge the HoD faced was the **high pupil teacher ratio** in the school. She felt that the class sizes were unmanageable as the DoE set the ratio as 40:1 so there was not much the school could do to change the situation.

She felt if the DoE does not lower the teacher pupil ratio, then at least provide more HoDs to manage each phase. One HoD allocated per phase to manage and control twelve to fifteen teachers and classes is not feasible and puts pressure on them which is a major stumbling block. This hinders the role of the HoD as instructional leader. Besides the monitoring and evaluation of the curriculum, HoDs are overloaded with administrative tasks and have to meet deadlines prescribed by the DoE. The IQMS become a difficult task for the HoD to manage if class sizes are large.

### **4.5.3. Teacher's perceptions (School 1, 2 and 3)**

The teachers in all three schools perceived the HoDs tasks as challenging as the workload was demanding. The following views were collected from the teachers in the schools who indicated the challenges below:

- Staff not submitting necessary documentation timeously
- The vast curriculum provided certain difficulties
- Teachers failing to comply with policy
- Lack of adequate resources for teachers
- Lack of computer skills by secretarial staff
- Lack of learner discipline and poverty
- Lack of parental participation

#### **4.6. Conclusion**

This chapter presented the data collected from the different participants which was then analysed. Findings from the data indicate that principals and teachers both acknowledge the role of the F. P. HoD as instructional leader and fully agree that they play an important role in leading and managing the curriculum in schools (Bush, 2013). HoDs hold the key that unlocks the potential of staff and learners and their importance in learner success and achievement cannot be further highlighted.

The next chapter discusses the major findings from the presentation and analysis of the data.

## **CHAPTER 5: FINDINGS, DISCUSSION AND IMPLICATIONS**

### **5. Introduction**

This chapter provides a reflective overview and discusses the findings of the study from data generated in the previous chapter. Conclusions for the research questions based on the topic are presented below.

#### **5.1. A reflective overview of the study**

The main purpose of this study was to explore the role of the F. P. HoD as instructional leader in promoting effective teaching and learning to improve school results. The background to the study shows that learner performance in many schools across the country remains poor despite numerous efforts made to improve especially in Maths and English (Hoadley, 2008). This study shows how the specific instructional role of the F. P. HoD plays an important part in leading and managing the curriculum to affect school improvement.

This role of the HoD is further compromised by the challenges they face in trying to enact their instructional leadership roles in schools. This was highlighted in the data collected from schools. The researcher being in the field of education for 28 years, and HoD of the F. P for 19 years, proposed the research and sub-research questions. The research question intends to understand what the instructional role and responsibility of the F. P. HoD is in order to promote effective teaching and learning. In South African schools the HoD as middle manager plays an important role in leading and managing the curriculum and therefore it is important to explore their functions as leaders in coordinating, delivering, monitoring and evaluating the curriculum so that learners achieve the desired goals. This study will present findings about the notion of instructional leadership practices and its influence in improving school results.

To answer the main research question the researcher developed the following sub-research questions:

1. How the notion of instructional leadership is conceptualised and defined by staff in primary schools?
2. What are the main roles and responsibilities of HoDs as instructional leaders in promoting an effective culture of teaching and learning in the F. P.?
3. To investigate how the implementation of instructional leadership practices impact/influence teaching and learning in the F. P.?
4. To outline the challenges that HoDs experience in providing effective leadership and management of teaching and learning and how they respond to it?

## **5.2. Limitations of the Study**

According to du Plooy-Cilliers et al. (2014) limitations are the restrictions or constraints in the research study that is simply out of the researcher's control, and include time, financial resources, access to information and other factors. As the researcher does not have complete control over every aspect within the scope of the study, it is quite understandable to experience some limitations. As only three primary schools in Johannesburg were used in the sample population the findings cannot be generalised to all public primary schools in South Africa. The exclusion of deputy principals as participants for the study is a limitation as the researcher would have gained more information and knowledge about the role of the HoD as deputy principals are responsible for the management of the curriculum and oversee the work of HoDs. As only GDE schools were sampled, the data collected cannot be applied to all F.P. HoDs in all schools.

This study relied on the self-reported perceptions of the Principals, HoDs and teachers; therefore the responses could possibly reflect subjective views or socially acceptable answers instead of actual reflections of reality. The responses of the teachers towards the leadership and management practices of the HoD could be biased as they may not share a professional working relationship and other personal factors may hinder truthful responses from them. Due to the nature of the interviews (face to face) anonymity was compromised as the researcher knew the identities of the participant's and this could have prevented honest responses to the questions. Principals may not have been truthful in their replies, as they may have felt the need to portray a positive image of their schools. As learner teacher ratios and contexts vary as well as the leadership and management style of each school the findings cannot be generalised to all primary schools in South Africa.

### **5.3. Discussion of key findings**

#### **Linking themes to leadership models**

As this study is based on the leadership models of both Hallinger and Murphy (2000) and later Webber (1996) it is important to highlight the five essential domains and link these to the broad range of tasks related to the role of the instructional leader in primary schools. The findings are presented under themes that emerged from an inductive analysis of the interview transcript reports and questionnaires. The results of the dominant themes that emerged from the interviews and questionnaires are presented below:

#### **5.3.1. Conclusions for Research Question**

#### **5.3.2. Sub-research question 1**

Two of the three principals were able to provide a detailed definition of the concept of instructional leadership. Although the F. P. HoDs knew of the concept, they were unsure about what it actually required them to do to improve teaching and learning. This shows that HoDs are unsure of their tasks and feel that their roles mostly entail simply assisting teachers to deliver the curriculum effectively. The HoDs spend much time completing administrative tasks as compared to teaching and learning activities. Although most teachers in the schools had an idea of the instructional role of the HoD they were not completely sure of what exactly their HoDs were supposed to do. Many mentioned more managerial aspects of the curriculum than leadership skills and qualities (Bush, 2013). The responses of the participants indicate clearly that schools have not fully comprehended and absorbed the concept of instructional practices and functions into the role of HoDs.

#### **5.3.3. Sub-research question 2**

Defining the school's vision and mission

Principals, HoDs and teachers in the schools stressed the importance of the SMT describing exact scope, nature and meaning of the school's vision and mission statement. This provided staff, pupils and parents with a view to how and where the school was preparing the future success of its stakeholders. This connects to Webber's first domain of instructional leadership (Naicker et al., 2013). The surmise here is that the SMT works with all partners to develop common, mutually acceptable goals for the school.

In the schools researched, this domain proved to be extremely important for all stakeholders as the mission statement provided them with a clear definition of the schools' aims, objectives and approaches to achieve their goals.

### **Effective communication and collaboration**

The final domain of Webber's model is "*assessing the instructional programme*" which is achieved by ensuring that effective communication and collaboration between all stakeholders take place regularly (Naicker et al., 2013). This involves the instructional leader contributing to the planning, designing, administration and analysis of assessment that evaluates the effectiveness of the curriculum. All participants indicated that one of the main roles of the instructional leader was evaluating the instructional programme regularly, and effectively communicating the schools goals and curriculum matters to ensure the effectiveness of teaching and learning. This resonates with Tikly and Ngcobo's (2010) study which agrees that good communication skills are a key characteristic of effective leadership and management. The communicative and collaborative role of the SMT is extremely important in providing goals and incentives for teachers and learners.

### **Supporting the growth and development of staff**

Data emerging from the research indicate that the participants agreed that staff development is an important part of the HoDs role. Supporting teacher's personal growth and development provided teachers and learners with more control over the teaching and learning process and allowed teachers to upgrade their knowledge and skills. Blasé and Phillips (2000) assert that staff development and growth are one of five prescriptive models that describe instructional leadership. Researchers, Blasé and Phillips (2000) and Leithwood (1999) have linked staff growth and development to teacher commitment, classroom instruction and student progress. All educator participants emphasised that receiving support from within and outside the school supported their professional growth and guidance, encouraged and promoted reflective teaching and learning and provided opportunities for personal empowerment.

### **Leading and managing the curriculum**

"*Managing the curriculum and instruction*" (Naicker et al., 2013) links to the second domain of Webber's model and involves the leader making resources available to support

the curriculum. The data that emerged from schools placed importance on the HoD leading and managing the curriculum with the assistance of the Grade Leaders and Subject Heads. Associated with this theme is the role of supervision, monitoring, coordinating and modelling school activities to produce successful classroom instruction and improved learner achievement. This aligns with the fundamental requirements asserted by Bush et al. in their 2010 study on developing effective teaching and learning in schools. The study on South African schools placed sound and proactive leadership and management of the curriculum as a core factor in enhancing classroom practice and improving pupil outcomes. Studies by Bush et al., 2010 emphasise the importance of leadership and management to further improve the quality of teaching and learning. The findings from this research also support the role that the HoD plays in leading and managing the curriculum.

### **Promoting a positive learning climate**

This theme directly relates to the third domain of Webber's model which is "*promoting a positive learning climate*" (Naicker et al., 2013). It involves the HoD promoting a positive learning environment by communicating important school goals and establishing expectations for staff and learners to achieve successful outcomes. Providing and promoting a positive learning climate in schools is a theme that was highly advocated by the participants of the study who felt that this instructional role was an important part of a leaders responsibility. This is generally done by the school's SMT and teachers. Participants mentioned that working in a positive learning environment was important to promote and achieve the goals of the school which is also stated by the DoE, that SMTs have the responsibility to promote a successful learning climate and develop and grow the school as an effective learning organisation (PAM, 2016).

### **Monitoring and providing regular feedback to teachers and pupils**

The fourth domain of Webber's model is "*observing and improving instruction*" (Naicker et al., 2013) and directly relates to the theme of monitoring and giving regular feedback to improve delivery of the curriculum. The HoD must observe, monitor and improve instruction by conducting classroom visits and providing professional growth and development opportunities for staff and learners. HoDs have the direct responsibility for leading and managing their phases and interviews with the HoDs point to them being directly involved in monitoring and providing regular feedback to teachers and parents on

curriculum issues (Bush et al., 2010). Data collected from HoDs showed that teachers and learners value feedback given by leaders who work closely with them, the curriculum and classroom teaching.

#### **5.3.4. Sub-research question 3**

Evidence from the participants indicates that the role of the HoD does impact positively on the effectiveness of teaching and learning. This confirms that they play a crucial role in the effective delivery of the curriculum in the F. P. so that a culture of collaboration, communication and collegiality is promoted which leads to the improvement of learners' results. Despite the schools being in different economic and social contexts, the data suggests that HoDs who promote teamwork, collaborate, communicate, monitor, evaluate and provide professional development, help to improve teaching and learning in their schools. This is consistent with current research that emphasise that schools with strong instructional leaders are most likely to produce positive learner outcomes (Bush, 2013, Hallinger, 2006 & Hoadley 2008). Providing internal staff support to each other in schools proved to be a major form of assistance and motivation for new and less experienced teachers. Teachers felt they learnt best from peers and colleagues in their own working environment and having available knowledge and expertise on hand was a lifeboat for them. Many teachers did not feel the need to get support from outside the school structure and honed in on people skills within their schools. This ties in closely with the concept of teamwork which brings us to the next theme.

In the data collected the teachers worked as a team in two schools. In school 3 the data shows a conflict situation between the HoD and one teacher. This teacher's view of the HoD was different to that of the other two participants. The HoDs indicated that for the school to achieve its goals, they put their differences aside and worked together with the vision and mission in mind. This resonates with Hallinger's (2005) study that instructional leaders always define the schools vision and mission to the staff so that they are able work towards achieving these goals. The use of teamwork is important as it provides a sense of collaboration and supports, guides and encourages reflective teaching and learning for all in schools.

It is extremely important to have teaching staff that are skilled, knowledgeable and abreast with educational issues and this converges with the next theme which is the necessity of

pedagogical knowledge. The teacher participants agreed that their HoDs were knowledgeable about curriculum and educational matters and were able to assist with instructional practices. Two of the three schools had experienced HoDs and this really worked in the best interest of the school. In School 1, the HoD felt that she did not have all the answers but willingly consulted the principal on crucial matters. The necessity of pedagogical knowledge aligns with subject content knowledge and reflects on what researchers (Shulman, 1986 & Bush, 2013) have said about its importance in the school environment. Pedagogical content knowledge focuses on how well teachers grasp and understand the content they are delivering and how well their students learn this content (Bausmith & Barry, 2011).

#### **5.3.5. Sub-research question 4**

After analysing the data collected the multiple challenges faced by HoDs in trying to implement instructional leadership practices was noted. HoDs indicated that they experience difficulty trying to coordinate and balance all their leadership and management functions and therefore appreciated assistance from their principals. All HoDs in the study had form classes to teach in addition to monitoring staff and learners in the phase. This made it extremely difficult for them to complete all tasks during the school day, so taking work home was imminent and this impacted on their well-being.

HoDs emphasised that when they tried to share tasks with their Grade Leaders and Subject Heads, they faced resistance and were reluctant to help because they were not compensated for doing extra tasks. This corresponds with the features of instructional leadership where teacher's behaviours are affected which requires leaders to build a system of collegiality and collaboration to influence such behaviour so that they work together for the benefit of learners (Blasé & Phillips, 2010).

#### **5.3.6. The Main research question**

From the perceptions and views of staff in the schools researched, the main role of the F. P. HoD is to improve teaching and learning and their behaviour and skills affect teacher and learner performance and well-being. Leaders need to create a culture of teaching and learning in schools which will impact on learner performance.

The participants agreed that leading and managing the curriculum, supporting teacher's development, working as a team, and providing and communicating school goals was an important role for HoDs. Coordinating the curriculum and supervising and evaluating classroom instruction made a difference to teacher performance and learner results. These instructional practices were mentioned as having a strong impact on school achievement.

#### **5.4. What else could have been done in this study in hindsight?**

In reflecting on the findings of this study the researcher realised that discourse analysis could have provided another level of interpreting the verbal language used to provide information in response to the research question on instructional leadership. Focus groups could have been included using HoDs and teachers as participants to discuss and highlight the roles and responsibilities of the F. P. HoD. This could have possibly added another layer of important information in understanding the roles and responsibilities of the instructional leader in the F. P. As focus groups allow interaction between participants, the information that emerges from these discussions may have yielded more novel information that may not have come across through one on one interviews and questionnaires.

The research study could have also included other SMT members such as the School Based Support Team coordinator, senior teachers, grade leaders and subject heads as these staff members work closely with the HoDs and are directly involved in curriculum delivery. Furthermore the researcher could have gained greater insight into the role of the HoD as instructional leader if planning and preparation meetings were observed to gain more information on leadership practices in the three schools visited.

#### **5.5. Conclusion**

Drawing on the two leadership models, the researcher's aim was to theorise the instructional leadership practices of HoDs in the F. P. However it is the researcher's belief that the roles mentioned above should not be the entire responsibility of the principal, deputy or HoD. This can be achieved by distributing tasks and duties to individuals who are capable of working for the benefit of the institution. This chapter provided a reflective overview of the study, highlighted the limitations, linked the themes to leadership models and discussed the findings of the data collected.

The next chapter concludes the study by presenting a summary, providing recommendations and implications and highlighting areas further for research

## **CHAPTER 6: STUDY SUMMARY, CONCLUSIONS AND RECOMMENDATIONS / IMPLICATIONS FOR FURTHER RESEARCH**

### **6. Introduction**

This chapter provides a summary of the study, implications for theory and practice, areas for further research and concludes with recommendations.

#### **6.1. Summary of the study**

The principal participants had a fairly good idea of the concept of instructional leadership, but their views, reveal that this concept did not fall within their scope of leadership responsibilities. They see this as the responsibility of HoDs and deputy principals in the school. Therefore the study shows that HoDs are more easily linked to instructional leadership practices as they are directly involved with curriculum matters. HoDs should be good instructional leaders as teachers rely heavily on their expertise as leaders and managers of the curriculum. Principals in turn, rely on the HoDs to control, monitor and evaluate the instructional programme of teachers and learners and then report to them. Data analysed in this study reflect that the principal's role was merely one of overseeing the work of HoDs and deputy principals rather than working directly with them and the curriculum. This study explored the role of the HoD as instructional leader and has placed more emphasis on the HoDs role and responsibilities in the F. P. The study confirms that HoDs who provide instructional leadership in the F. P. definitely impact on and influence the teaching and learning process to achieve positive school results. Therefore the actions of instructional HoDs as leaders and managers of the curriculum lead to an improvement of teaching and learning (Mestry, 2017).

#### **6.2. Implications for theory**

Throughout this study, the literature points to the benefits of implementing instructional leadership practices to improve and enhance learner achievement. The findings confirm what instructional leadership theories propose as key features of successful schools. This is

consistent with Bush et al., (2010) examination of the significance of leadership and management in improving learner outcomes.

The findings show that the instructional leadership concept has been supported as an effective leadership theory and if implemented effectively can improve learner achievement in schools. The instructional leadership theories have offered school leaders a range of important features to assist in turning schools around. It is now up to school districts, principals and educationalists to ensure that HoDs are aware of these features and work towards utilising them in schools. The findings of this study will help future leaders and managers make important decisions about what really good instructional leaders do to improve teaching and learning and the effects of their behaviour on teacher's performance, well-being and the success of learners. The instructional leadership construct has provided significant elements for school leaders to work on. By dispersing tasks across different people in the school and implementing the five key dimensions of Webber's (1996) model of instructional leadership will assist leaders to make a difference to school results.

The F. P. of every school is considered to be the cornerstone of a child's schooling career on which learning behaviours, knowledge and skills are built, in preparation for the future. If this structure is weak or inadequate it will then be filtered to the next phase. As such the learner will not be able to use their foundational knowledge and skills to acquire new important and relevant knowledge to progress.

### **6.3. Implications for practice**

Drawn from the research findings, school leaders can enact instructional leadership practices to ensure that effective teaching and learning takes place. The principal plays an important role as co-ordinator of the curriculum and should assist the HoD by distributing tasks to competent staff to avoid an overload of administrative duties. By creating teacher leadership within the school the HoD will be able to engage in more instructional practices to assist teachers with classroom management and curriculum delivery (Grant, 2006). The principal must clearly emphasise the need for instructional leadership and staff should co-operate and support such structures. The GDE needs to offer more support to HoDs in terms of policy development and setting up professional learning communities which will assist them to

discuss curriculum issues and engage with other school leaders in order to share ideas that will improve learner outcomes.

HoDs need to develop strategies to manage and balance their leadership functions so that these do not impact on their roles as instructional leaders.

#### **6.4. Recommendations**

The researcher concurs with the vast body of literature that recommends that HoDs need specialised training on instructional leadership practices as their roles and responsibilities transcend beyond the normal framework as stated in their job descriptions (Hoadley, 2008).

SMTs must acknowledge that there are multiple role players involved in implementing instructional leadership practices. F. P. HoDs and deputies must work with principals to ensure that instructional practices are enacted daily at the classroom level. From the findings presented it is likely that HoDs have not been fully trained on instructional leadership practices and this requires the GDE to clearly outline the instructional roles and responsibilities of HoDs as many are unsure of what is expected from them. The GDE also needs to address the issue of HoDs teaching 85 per cent of their timetable so that they could have more time for instructional practices which would benefit the school results. The PAM (2016) document needs to be revised to balance out administrative tasks and teaching responsibilities. Principals need to revisit the workload of HoDs and spread tasks among competent staff so that teachers also become leaders of the curriculum (Grant, 2006). This will empower teachers and reduce the administrative tasks of HoD which will allow more time for curriculum matters.

Therefore a multi – level strategy approach is required to prepare and train principals, HoDs and teachers to fulfil their roles and responsibilities (Steyn, 2002). This type of teacher professional development will result in school based management which is participative and allows the delegation of authority from higher to lower levels in the school. This devolution of authority to teachers will develop more teacher leaders and assist HoDs to overcome the challenges they face as instructional leaders (Steyn, 2002).

In many South African schools instructional leadership is about the HoD setting the stage for exemplary teachers to become outstanding in their everyday practice and use these skills and

knowledge to impact on learner performance. HoDs have a strong connection to the classroom and therefore need to be role models for teachers, assisting them to build a culture of collaboration and collegiality (Roberts & Roach, 2006).

The DoE must provide development programmes similar to the ACE which will assist HoDs as leaders of the curriculum so that they are fully aware of what their jobs entail.

#### **6.5. Areas for further Research**

What needs to be further addressed is the actual behaviour of F. P. teachers as they engage in instructional classroom practice. More research into implementing instructional leadership practices should be done in underperforming primary schools in South Africa. These schools face challenging situations and would benefit from this leadership model. Further studies need to be conducted to better understand how the principal and deputy can support the HoD to deal with the challenges they face in trying to enact instructional leadership.

#### **6.6. Contributions of the study**

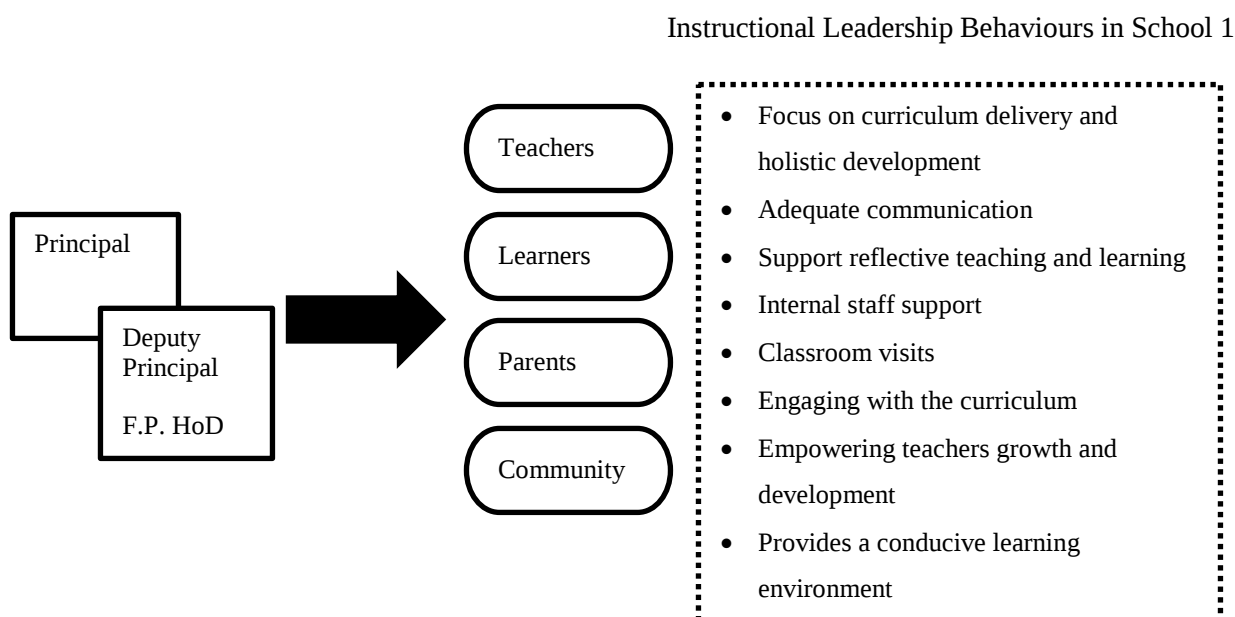
This study was conducted in the hope that the gap in literature on instructional leadership practices in the F.P. would be useful and future researchers and educationalists would refer to it to gain some benefit from the findings mentioned. A plethora of literature exists on the instructional leadership role of the school principal, but little has been researched on the F. P. HoDs and their roles in instructional leadership practices especially in South Africa. The study has shown that the responsibility for managing teaching and learning should be shared between the SMT. HoDs are responsible for effective teaching and learning in their phases, while teachers ensure the effective delivery of the curriculum in their classrooms and principals and deputies share an overall school responsibility (Bush et al., 2010). This study has highlighted the important role that F. P. HoDs play in the delivery of the curriculum and why they should be supported by principals and deputies as they enact their roles. Studies conducted (Worner & Brown, 1993) show that instructional leadership is a shared responsibility. While principals have the duty to account for the overall success of the school, deputies, HoDs and teachers share the task of carrying out instructional leadership practices on a daily basis.

This study is important as it provides information on instructional leadership practices in different school contexts in the F. P. and can be useful to convert priority schools into successful learning organisations. The study attempts to provide F. P. HoDs with an understanding of how they can enact instructional leadership and how important this concept is to improve learner outcomes in their departments.

## 6.7. Diagrammatic Representation of Instructional Leadership behaviours in the three primary schools:

### 6. 7.1.

#### Model A: Instructional leadership behaviours in School 1:

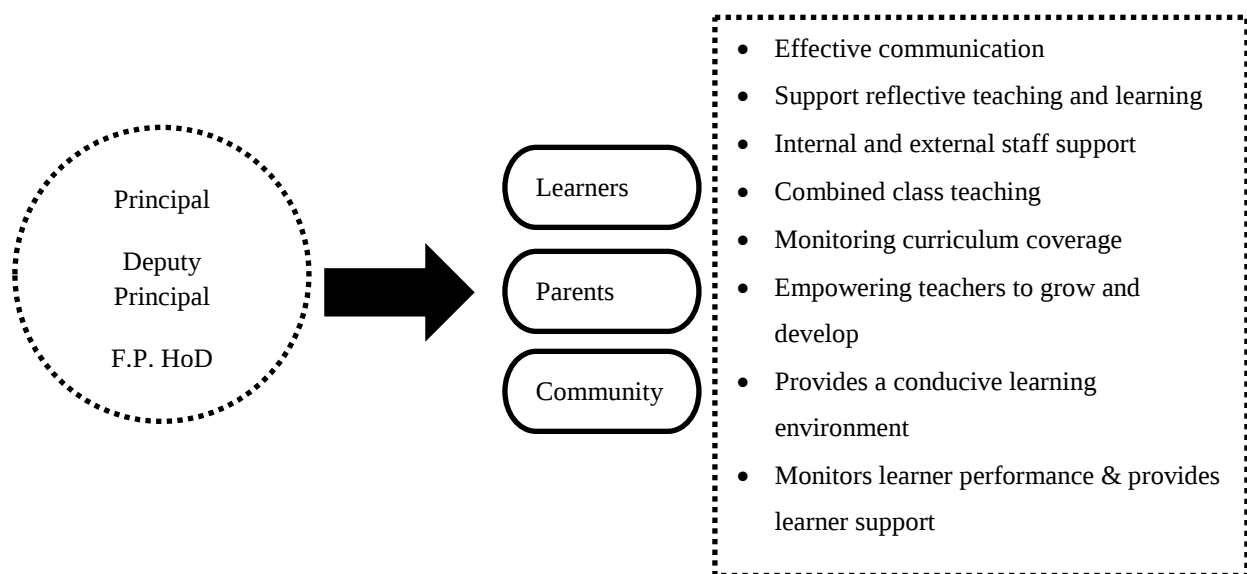


Model A represents the instructional leadership behaviours found in School 1, a suburban school in Johannesburg. In Model A the principal and F.P. HoD work together to provide instructional leadership practices to the teachers in the F.P. The principal relies on the F.P. HoD monitor and control the delivery of the curriculum. As the HoD is directly involved with the teachers and management of classroom instruction they have greater control over teaching and learning, which is driven effectively through the instructional leadership practices of the HoD. The questionnaires from the teachers in the F.P. show that the instructional leadership behaviours represented in Model A were common to their school and these behaviours came out strongly

among them in their responses to the questionnaires. A holistic approach is prevalent incorporating all aspects of developing the learners as a whole. Thus in School 1, good instructional leadership occurs through both the principal and F. P. HoD and this is then filtered down to the Grade Leaders and Subject Heads and teachers. Model A clearly shows the connection between the principal and F.P. HoD who work together to provide instructional leadership to all stakeholders.

### 6.7.2. Model B: Instructional leadership behaviours in School 2:

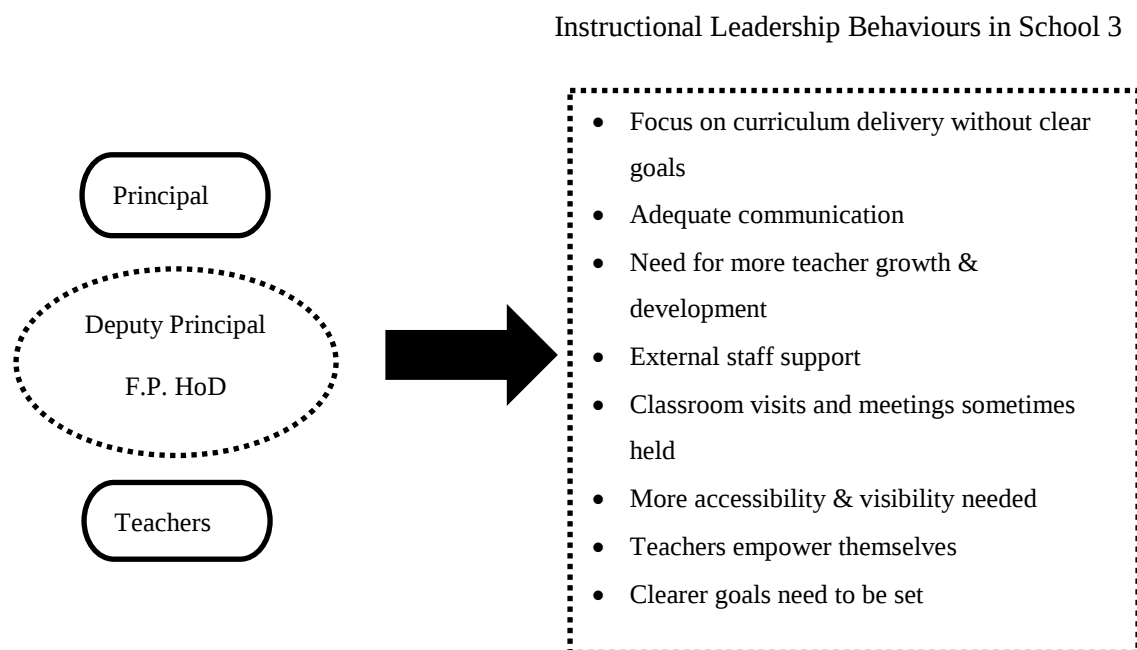
Instructional Leadership Behaviours in School 2



Model B represents the instructional leadership behaviours in School 2, a township school in Johannesburg. Model B is in clear contrast to Model A and shows how involved the principal, F.P. HoD and teachers are in providing instructional leadership. In School 2, all stakeholders work in harmony and uplift the school in many ways to create a well performing school. Teacher leaders are incorporated into the leadership decisions and they also provide instructional leadership practices to their peers, community and learners. School 2, although situated in a poor socio-economic area is a high functioning school that equips learners with skills that go beyond the norm. Learners are incorporated into gardening activities; they participate in Remedial and Support classes and work with the community to promote effective leadership and successful school results. The dynamic hand on approach by the principal bodes well for the school and its

immediate community. The community provides security for the school and are a part of the schools daily functioning. The parents volunteer and support the activities of the school and work closely to provide the best possible education for their children.

### 6.7.3. Model C: Instructional leadership behaviours in School 3:



Model C represents instructional leadership behaviours in School 3 which is an inner city school in Johannesburg. This model denotes a leader who is often detached from the day to day functioning of the school. Model C depicts the principal who stands outside the circle of the HoD and teachers. It also shows a clear disconnect between the principal, HoD and teachers. Although the HoD works with the teachers, some teachers in the school have indicated an authoritarian leadership approach to managing the school. Teachers have indicated that they work in isolation, only for themselves and are not willing to share their knowledge and skills with others.

The school community is not involved in school matters and many tasks are entrusted to the principal to handle. The SMT does not the full support of all teachers in the phase and some feel that force and coercion are used to get them to comply with administrative tasks and deadlines. Although some instructional leadership practices are evident as shown in Model C, more needs to be done by the SMT to incorporate all stakeholders into the school culture and ethos so that learners and teachers could benefit from an inclusive educational programme. Therefore SMT

and teachers need to work together to motivate teachers in order to enhance the instructional programme of the school.

Although the three models show different leadership practices in each school, it reveals similar dimensions of the instructional leadership concept. The domains that were common in all three schools were communication, creating a positive learning climate, effective curriculum delivery, internal support, sharing common goals, collegiality and growth and development.

## **6.7. Conclusion**

This study has explored and described the characteristics of instructional leaders and how these behaviours, attitudes and strategies influence classroom instruction and learner improvement. The researcher concurs with Todd and Mason (2005) that improved learning lies in developing teacher's pedagogical knowledge, skills, characteristics and behaviours which result in teachers seeing more success. The study presented findings of what good instructional leaders do that influence teachers teaching and learners learning. By presenting appropriate models, concepts, theories and strategies from the voluminous body of literature, the study illuminated the basic elements of instructional leadership and its influence on teaching and learning.

Presented in the study are clear descriptions of what F. P. HoDs do daily to ensure that teaching and learning takes place. Combining the findings of the study with the literature presented, the study has provided a holistic view of good leadership based on instructional practices, behaviours, skills and knowledge of school leaders and has shown how these attributes can improve teacher and learner performance in schools. The study described what successful instructional leadership looks like and highlighted the challenges that school leaders face in implementing instructional practices in individual working contexts. The study presented what instructional leaders do to improve school performance and shows how their individual behaviours support or harm teaching and learning. There is no doubt that leaders shape the conditions that directly influence teaching and learning for both learners and teachers. Our schools, after all, are the incubators of our future leaders, let's turn them around. Taken together all the studies highlight the crucial role of leadership as well as managers in the educational system.

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## Appendix A



### Wits School of Education

27 St Andrews Road, Parktown, Johannesburg, 2193 Private Bag 3, Wits 2050, South Africa.

Tel: +27 11 717-3064 Fax: +27 11 717-3100 E-mail: [enquiries@educ.wits.ac.za](mailto:enquiries@educ.wits.ac.za) Website: [www.wits.ac.za](http://www.wits.ac.za)

Date: 22 February 2017

Student number: 333008

Protocol Number: 2016ECE058M

Dear Cheryl Jugdav

#### **Application for Ethics Clearance: Master of Education**

Thank you very much for your ethics application. The Ethics Committee in Education of the Faculty of Humanities, acting on behalf of the Senate, has considered your application for ethics clearance for your proposal entitled:

#### **The Role of F.P. HODs as Instructional Leaders in Primary Schools: Implications for Teaching and Learning**

The committee recently met and I am pleased to inform you that **clearance was granted**. Please use the above protocol number in all correspondence to the relevant research parties (schools, parents, learners etc.) and include it in your research report or project on the title page.

All the best with your research project.

Yours sincerely,

Wits School of Education

011 717-3416 Cc

Supervisor: Dr Geeta Motilal

## Appendix B

### Appendix B



## GAUTENG PROVINCE

Department: Education  
REPUBLIC OF SOUTH AFRICA

8/4/4/1/2

### GDE RESEARCH APPROVAL LETTER

|                                |                                                                                                     |
|--------------------------------|-----------------------------------------------------------------------------------------------------|
| Date:                          | 19 April 2017                                                                                       |
| Validity of Research Approval: | 06 February 2017 – 29 September 2017<br>2017/73                                                     |
| Name of Researcher:            | Jugdav C.K.A                                                                                        |
| Address of Researcher:         | No 9 Kenneth Street<br>Waverley<br>Johannesburg, 2090                                               |
| Telephone Number:              | 082 371 6636                                                                                        |
| Email address:                 | cheryl.jugdav@hotmail.com                                                                           |
| Research Topic:                | The role of Heads of Department in instructional leadership: Implications for Teaching and Learning |
| Number and type of schools:    | Three Primary Schools                                                                               |
| District/s/HO                  | Johannesburg Central and Johannesburg East                                                          |

### 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 (both 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

7<sup>th</sup> Floor, 17 Simmonds Street, Johannesburg, 2001

Tel: (011) 355 0485

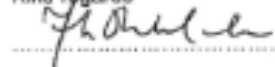
Email: Faith.Tshabalala@gauteng.gov.za

Website: www.education.gpg.gov.za

1. The District/Head Office Senior Manager/s concerned must be presented with a copy of this 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 outlines 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 examining the findings of your research study.

Kind regards



Ms Faith Tshabalala  
CES: Education Research and Knowledge Management

DATE: 19/04/2017

## Appendix C

LETTER TO THE PRINCIPAL

30 March 2017

Dear Sir/Madam

My name is Cheryl Jugdav. I am a part time student studying for the M Ed degree in the School of Education at the University of the Witwatersrand.

I am doing research on Instructional Leadership. The topic is: **The role of Heads of Departments as instructional leaders in primary schools in Gauteng: Implications for teaching and learning**

My research involves interviewing the Principal, F.P.HODs, and teachers. The instrument I will use is Interview Questions and Questionnaires which will not take more than an hour for each participant.

The reason why I have chosen your school is because it is an **inner city/Township/Former Model C school**.

I am inviting your school to participate in this research as it will provide useful guidelines for the HOD of the Foundation Phase and how she/he will gain knowledge on the benefits of instructional leadership which will help to improve learner outcomes and achievement.

The research participants will not be advantaged or disadvantaged in any way. They will be reassured that they can withdraw their permission at any time during this project without any penalty. There are no foreseeable risks in participating in this study. The participants will not be paid for this study.

The names of the research participants and identity of the school will be kept confidential at all times and in all academic writing about the study. Your individual privacy will be maintained in all published and written data resulting from the study.

All research data will be destroyed between 3-5 years after completion of the project.

Please let me know if you require any further information. I look forward to your response as soon as is convenient.

Yours sincerely,

*C. Jugdav*

Cheryl Jugdav

No 9 Kenneth Street, Waverley, Johannesburg, 2090

Cellular Phone: 082 371 6636

Home Tel: 011 7865372

[cheryl.jugdav@hotmail.com](mailto:cheryl.jugdav@hotmail.com)

LETTER TO THE F.P. HoD

30 March 2017

Dear Sir/Madam

My name is Cheryl Jugdav. I am a part time student studying for the M Ed degree in the School of Education at the University of the Witwatersrand.

I am doing research on Instructional Leadership. The topic is: **The role of Heads of Departments as instructional leaders in primary schools in Gauteng: Implications for teaching and learning**

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I am inviting your school to participate in this research as it will provide useful guidelines for the HOD of the Foundation Phase and how she/he will gain knowledge on the benefits of instructional leadership which will help to improve learner outcomes and achievement.

The research participants will not be advantaged or disadvantaged in any way. They will be reassured that they can withdraw their permission at any time during this project without any penalty. There are no foreseeable risks in participating in this study. The participants will not be paid for this study.

The names of the research participants and identity of the school will be kept confidential at all times and in all academic writing about the study. Your individual privacy will be maintained in all published and written data resulting from the study.

All research data will be destroyed between 3-5 years after completion of the project.

Please let me know if you require any further information. I look forward to your response as soon as is convenient.

Yours sincerely,

*C. Jugdav*

Cheryl Jugdav

No 9 Kenneth Street, Waverley, Johannesburg, 2090

[cheryl.jugdav@hotmail.com](mailto:cheryl.jugdav@hotmail.com)

Cellular Phone: 082 371 6636 Home Tel: 011 786537

Dear Sir/Madam

My name is Cheryl Jugdav. I am a part time student studying for the M Ed degree in the School of Education at the University of the Witwatersrand.

I am doing research on Instructional Leadership. The topic is: **The role of Heads of Departments as instructional leaders in primary schools in Gauteng: Implications for teaching and learning**

My research involves interviewing the Principal, F.P.HODs, and teachers. The instrument I will use is Interview Questions and Questionnaires which will not take more than an hour for each participant.

The reason why I have chosen your school is because it is an **inner city/Township/Former Model C school**.

I am inviting your school to participate in this research as it will provide useful guidelines for the HOD of the Foundation Phase and how she/he will gain knowledge on the benefits of instructional leadership which will help to improve learner outcomes and achievement.

The research participants will not be advantaged or disadvantaged in any way. They will be reassured that they can withdraw their permission at any time during this project without any penalty. There are no foreseeable risks in participating in this study. The participants will not be paid for this study.

The names of the research participants and identity of the school will be kept confidential at all times and in all academic writing about the study. Your individual privacy will be maintained in all published and written data resulting from the study.

All research data will be destroyed between 3-5 years after completion of the project.

Please let me know if you require any further information. I look forward to your response as soon as is convenient.

Yours sincerely,

*C. Jugdav*

Cheryl Jugdav

No 9 Kenneth Street, Waverley, Johannesburg, 2090

[cheryl.jugdav@hotmail.com](mailto:cheryl.jugdav@hotmail.com)

Cellular Phone: 082 371 6636

Home Tel: 011 78653

## Appendix D

INFORMATION SHEET: PRINCIPALS: SCHOOL 1, 2, 3

30 March 2017

Dear Principal

My name is Cheryl Jugdav and I am an M Ed Student in the School of Education at the University of the Witwatersrand.

I am doing research on: **The role of F.P. Heads of Department as instructional leaders in primary schools in Gauteng: Implications for teaching and learning.**

**(My research involves face to face interviews with Principals in the primary schools. The instrument I will use is Interview Questions which will be audio recorded. I will also be taking notes periodically. The interview will not take more than an hour and will be conducted after school from 15:00 pm or whenever it is convenient for you. Interviews will be conducted in the Principals office of your school).**

The reason why I have chosen your school is because it is an **Inner city school/Township/ Former Model C School** and I would like to explore the role of the leadership and management in improving teaching and learning.

**(Would you mind if I interview you to participate in this research as it will provide useful guidelines for the Principal, HOD as well as teachers of the Foundation Phase and how you all will gain knowledge on the benefits of instructional leadership which will help to improve learner outcomes and achievement)?**

**(Your name and identity will be kept confidential at all times and in all academic writing about the study. Your individual privacy will be maintained in all published and written data resulting from the study).**

**(All research data will be stored at the WSoE in my supervisor's office for 3-5 years and will be destroyed after completion of the project. All collected data will be used primarily for the writing of my Master's Thesis only).**

You will not be advantaged or disadvantaged in any way. Your participation is voluntary, so you can withdraw your permission at any time during this project without any penalty. There are no foreseeable risks in participating and you will not be paid for this study.

Please let me know if you require any further information.

Thank you very much for your help.

Yours sincerely,

**C, Jugdav**

**Cheryl Jugdav No 9 Kenneth Street, Waverley, Johannesburg, 2090**

**[cheryl.jugdav@hotmail.com](mailto:cheryl.jugdav@hotmail.com)**

Cellular Phone: 082 371 6636 / Home Tel: 011 7865372

Dear Principal

My name is Cheryl Jugdav and I am an M Ed Student in the School of Education at the University of the Witwatersrand.

I am doing research on: **The role of F.P. Heads of Department as instructional leaders in primary schools in Gauteng: Implications for teaching and learning.**

**(My research involves face to face interviews with Principals in the primary schools. The instrument I will use is Interview Questions which will be audio recorded. I will also be taking notes periodically. The interview will not take more than an hour and will be conducted after school from 15:00 pm or whenever it is convenient for you. Interviews will be conducted in the Principals office of your school).**

The reason why I have chosen your school is because it is an **Inner city school/Township/ Former Model C School** and I would like to explore the role of the leadership and management in improving teaching and learning.

**(Would you mind if I interview you to participate in this research as it will provide useful guidelines for the Principal, HOD as well as teachers of the Foundation Phase and how you all will gain knowledge on the benefits of instructional leadership which will help to improve learner outcomes and achievement)?**

**(Your name and identity will be kept confidential at all times and in all academic writing about the study. Your individual privacy will be maintained in all published and written data resulting from the study).**

**(All research data will be stored at the WSoE in my supervisor's office for 3-5 years and will be destroyed after completion of the project. All collected data will be used primarily for the writing of my Master's Thesis only).**

You will not be advantaged or disadvantaged in any way. Your participation is voluntary, so you can withdraw your permission at any time during this project without any penalty. There are no foreseeable risks in participating and you will not be paid for this study.

Please let me know if you require any further information.

Thank you very much for your help.

Yours sincerely,

*C, Jugdav*

Cheryl Jugdav

No 9 Kenneth Street, Waverley, Johannesburg, 2090

[cheryl.jugdav@hotmail.com](mailto:cheryl.jugdav@hotmail.com)

Cellular Phone: 082 371 6636

Home Tel: 011 7865372

Dear Principal

My name is Cheryl Jugdav and I am an M Ed Student in the School of Education at the University of the Witwatersrand.

I am doing research on: **The role of F.P. Heads of Department as instructional leaders in primary schools in Gauteng: Implications for teaching and learning.**

**(My research involves face to face interviews with Principals in the primary schools. The instrument I will use is Interview Questions which will be audio recorded. I will also be taking notes periodically. The interview will not take more than an hour and will be conducted after school from 15:00 pm or whenever it is convenient for you. Interviews will be conducted in the Principals office of your school).**

The reason why I have chosen your school is because it is an **Inner city school/Township/ Former Model C School** and I would like to explore the role of the leadership and management in improving teaching and learning.

**(Would you mind if I interview you to participate in this research as it will provide useful guidelines for the Principal, HOD as well as teachers of the Foundation Phase and how you all will gain knowledge on the benefits of instructional leadership which will help to improve learner outcomes and achievement)?**

**(Your name and identity will be kept confidential at all times and in all academic writing about the study. Your individual privacy will be maintained in all published and written data resulting from the study).**

**(All research data will be stored at the WSoE in my supervisor's office for 3-5 years and will be destroyed after completion of the project. All collected data will be used primarily for the writing of my Master's Thesis only).**

You will not be advantaged or disadvantaged in any way. Your participation is voluntary, so you can withdraw your permission at any time during this project without any penalty. There are no foreseeable risks in participating and you will not be paid for this study.

Please let me know if you require any further information.

Thank you very much for your help.

Yours sincerely,

*C, Jugdav*

Cheryl Jugdav

No 9 Kenneth Street, Waverley, Johannesburg, 2090

[cheryl.jugdav@hotmail.com](mailto:cheryl.jugdav@hotmail.com)

Cellular Phone: 082 371 6636 Home Tel: 011 7865372

## Appendix E

### Principal's Consent Form: **The role of F.P. Heads of Departments as instructional leaders in primary schools in Gauteng: Implications for teaching and learning.**

Please fill in and return the reply slip below indicating your willingness to be a participant in my voluntary research project called:

I, \_\_\_\_\_ give my consent for the following:

#### **Permission to be audiotaped**

**(I agree to be audiotaped during the interview)** YES/NO

I agree that the audiotapes will be used for this project only YES/NO

#### **Permission to be interviewed**

I would like to be interviewed for this study. YES/NO

I know that I can stop the interview at any time and don't have to  
answer all the questions asked. YES/NO

#### **Informed Consent**

I understand that:

- My name and information will be kept confidential and safe and that my name and the name of my school will not be revealed.
- I do not have to answer every question and can withdraw from the study at any time.
- **(I can ask not to be audiotaped).**
- All the data collected during this study will be destroyed within 3-5 years after completion of my project.

Sign\_\_\_\_\_

Date\_\_\_\_\_

HoDs Consent Form: **The role of F.P. Heads of Departments as instructional leaders in primary schools in Gauteng: Implications for teaching and learning.**

Please fill in and return the reply slip below indicating your willingness to be a participant in my voluntary research project called:

I, \_\_\_\_\_ give my consent for the following:

**Permission to be audiotaped**

**(I agree to be audiotaped during the interview)**

YES/NO

I agree that the audiotapes will be used for this project only

YES/NO

**Permission to be interviewed**

I would like to be interviewed for this study.

YES/NO

I know that I can stop the interview at any time and don't have to answer all the questions asked.

YES/NO

**Informed Consent**

I understand that:

- My name and information will be kept confidential and safe and that my name and the name of my school will not be revealed.
- I do not have to answer every question and can withdraw from the study at any time.
- **(I can ask not to be audiotaped).**
- All the data collected during this study will be destroyed within 3-5 years after completion of my project.

Sign\_\_\_\_\_

Date\_\_\_\_\_

Teachers' Consent Form: **The role of F.P. Heads of Departments as instructional leaders in primary schools in Gauteng: Implications for teaching and learning.**

Please fill in and return the reply slip below indicating your willingness to be a participant in my voluntary research project called:

I, \_\_\_\_\_ give my consent for the following:

**Permission to be audiotaped**

**(I agree to be audiotaped during the interview)**

YES/NO

I agree that the audiotapes will be used for this project only

YES/NO

**Permission to be interviewed**

I would like to be interviewed for this study.

YES/NO

I know that I can stop the interview at any time and don't have to answer all the questions asked.

YES/NO

**Informed Consent**

I understand that:

- My name and information will be kept confidential and safe and that my name and the name of my school will not be revealed.
- I do not have to answer every question and can withdraw from the study at any time.
- **(I can ask not to be audiotaped).**
- All the data collected during this study will be destroyed within 3-5 years after completion of my project.

Sign\_\_\_\_\_

Date\_\_\_\_\_

## **Appendix F**

### **Principals' Interview Questions**

1. How would you define and communicate the goals of the school to teachers and learners?
2. What is your understanding of the term “instructional leadership”? Please explain?
3. As the principal, providing a positive learning culture/climate is important for the success of your school. How do you achieve this in your school?
4. Time management is an important part of the school daily activity. How do you ensure that instructional time is not interrupted?
5. Monitoring that classroom curriculum is aligned to school goals is extremely important for school success. How do you control and manage this process?
6. Providing feedback on the teaching and learning process helps the principal to ensure that the curriculum is consistent with the school goals. Are you involved in this process? Explain how it is done? What is your role in this process?
7. Encouraging and motivating teachers is an important part of providing professional development to them. How does your school use the data on school progress to achieve this for all teachers?
8. Does your school furnish teachers with adequate resource material to promote the successful implementation of the curriculum? Is this successful? Describe how this is done?
9. Learner assessment is a key element in determining the success of every school. What in your opinion is the principal's role in ensuring that teachers use data analysis of learner's results to improve and support learners?
10. What steps do you take as principal to evaluate your teachers so that they can improve their instructional practices?
11. What challenges do HoDs face in providing instructional leadership and management of the curriculum?
12. How do you assist to overcome these challenges?

## Appendix G

### HoDs Interview Questions

1. What do you understand by the term “instructional leadership”?
2. What do you think is the main role of the instructional leader (HoD) in the school?
3. As instructional leader how do you manage and lead the curriculum in the F. P.?
4. Explain the steps that you take to ensure that the teaching and learning process is successfully implemented by all the teachers in the phase.
5. As HoD of the FP, do you think that it is important for HoDs to have pedagogical knowledge, skills, values and attitudes?

Yes

No

Why is it important?
6. Are your school goals aligned to the curriculum?

Yes

No
7. How are these goals used when making academic decisions?
8. How often do you visit the classroom to ensure classroom instruction aligns with school goals?
9. How and when are teachers evaluated to improve instructional practices? Explain this process.
10. How do you as HOD provide professional development opportunities around instructional practices within the school environment? Explain how this is done? Are there systems in place to ensure that this is being done?
11. How is continuous assessment monitored and evaluated for each teacher in the Grade?
12. Planning and preparation is a successful part of delivery of the curriculum to ensure its success. How is this done in your phase?
13. How is assessment results used to guide discussions on the instructional program in the F.P.?
14. Communication and collaboration is a big part of the instructional program in any organisation. How is this done at your school?
15. Is there a correlation of assessment results from Grade 1 to 2 and from Grade 2 to 3? If so, how have you achieved this?

Yes

No

16. As HoD of the FP, how do you monitor and provide feedback on the teaching and learning process to the teachers in your phase? Explain.
17. As instructional leader in the F.P. how do you promote a positive learning climate in your phase?  
Are your teachers receptive to these efforts? How do they respond?
18. What challenges do you face in providing leadership and management of teaching and learning in the FP?
19. How do you think these challenges can be overcome? Who do you feel could assist you to overcome them?

## Appendix H

### Teacher's Questionnaire

1. What is your understanding of an instructional leader? Explain your thoughts.

2. Do you think that your HOD can be classified as an “instructional leader”?

No

Yes

Give reasons for your answer.

3. Would you say that the F.P. department is achieving all its curricula outcomes each term?

Yes

No

Provide reasons for your answer.

4. How does your HOD help teachers to evaluate curricula and suggest changes to meet learner's needs?

What methods are used by the HoD to communicate to teachers' information about instructional concerns? How often does this take place?

5. Does your HoD promote the exchange of ideas and resources among teachers in the phase?

Yes

No

How is this process executed?

6. Is the HOD providing programs to improve the performance of teachers after results are analysed?

Yes

No

If yes, what types of programs are provided?

7. Does the HOD evaluate individual teacher's performance as a means of further growth and development?

Yes

No

8. Explain how this is done.

9. How are you being motivated /assisted by your HOD to provide extra support for learners in your class who are not achieving as well as learners who are high achievers?

Is this method successful? Provide reasons for your answers

No

Yes

10. Are new developments and instructional practices being provided to you by your HOD?

Yes

No

Explain the processes and procedures used to do this?

11. Is it imperative for HoDs to have pedagogical knowledge, skills, values and attitudes?

Yes

No

Give reasons for your answer.

12. What in your opinion are the main roles and responsibilities of the HoD as instructional leader?

13. What challenges do HoDs face in providing leadership and management of teaching and learning?

14. How does your HoD respond to these challenges?

## Appendix I

### Project: Instructional Leadership Transcript 1 – Principal Suburban School

Report created by Sasha Jugdav on 8/17/2017

#### Quotations Report

All (30) quotations

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#### D 1: Transcript of Interview 1 - 1:1 communicated to the staff in meetings, policies and then the kids in a... (632:711)

communicated to the staff in meetings, policies and then the kids in assemblies

##### 1 Codes:

- Adequate Communication

Created by Sasha Jugdav on 8/17/2017

##### 1 Quotations:

D 1: Transcript of Interview 1 - 1:1 communicated to the staff in meetings, policies and then the kids in a... (632:711)

---

#### D 1: Transcript of Interview 1 - 1:2 education uhm, as a whole (452:476)

education uhm, as a whole

##### 1 Codes:

- Integrated Value system

Created by Sasha Jugdav on 8/17/2017

##### 4 Quotations:

D 1: Transcript of Interview 1 - 1:2 education uhm, as a whole (452:476) / D 1: Transcript of Interview 1 - 1:3 continuous three R's, like life skills for me, are very very important... (502:578) / D 1: Transcript of Interview 1 - 1:4 I always say it doesn't help you to know how to read and write if you... (873:1130) / D 1: Transcript of Interview 1 - 1:6 so how do we approach it, with a caring approach etc. (1520:1572)

---

#### D 1: Transcript of Interview 1 - 1:3 continuous three R's, like life skills for me, are very very important... (502:578)

continuous three R's, like life skills for me, are very very important okay,

##### 1 Codes:

## Project: Instructional Leadership transcript 2- Principal Rural School

Report created by Sasha Jugdav on 8/19/2017

### Quotations Report

All (26) quotations

---

#### D 1: Transcript of Interview 2 - 1:1 collective management (344:364)

collective management

#### 2 Codes:

- Alignment of goals, vision, mission

Created by Sasha Jugdav on 8/19/2017

#### 4 Quotations:

D 1: Transcript of Interview 2 - 1:1 collective management (344:364) / D 1: Transcript of Interview 2 - 1:2 love the inputs of each and every stakeholder (447:491) / D 1: Transcript of Interview 2 - 1:3 The, the vision and mission of our school, it's imbedded into the visi... (996:1267) / D 1: Transcript of Interview 2 - 1:4 So the main purpose obviously is to teach our children that they can b... (1512:1634)

- Holistic Leadership

Created by Sasha Jugdav on 8/19/2017

#### 2 Quotations:

D 1: Transcript of Interview 2 - 1:1 collective management (344:364) / D 1: Transcript of Interview 2 - 1:2 love the inputs of each and every stakeholder (447:491)

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#### D 1: Transcript of Interview 2 - 1:2 love the inputs of each and every stakeholder (447:491)

love the inputs of each and every stakeholder

#### 2 Codes:

- Alignment of goals, vision, mission

Created by Sasha Jugdav on 8/19/2017

#### 4 Quotations:

D 1: Transcript of Interview 2 - 1:1 collective management (344:364) / D 1: Transcript of Interview 2 - 1:2 love the inputs of each and every stakeholder (447:491) / D 1: Transcript of Interview 2 - 1:3 The, the vision and mission of our school, it's imbedded into the visi... (996:1267) / D 1: Transcript of Interview 2 - 1:4 So the main purpose obviously is to teach our children that they can b... (1512:1634)

## **Project: Instructional Leadership transcript 3- Principal Inner City School**

Report created by Sasha Jugdav on 8/19/2017

### **Quotations Report**

All (21) quotations

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#### **D 1: Transcript of Interview 4 - 1:1 I for one, is able to manage curriculum, monitor lesson plans that the... (731:1067)**

I for one, is able to manage curriculum, monitor lesson plans that they are in line with the management plans, curriculum, statement, one needs to set a goal (inaudible), so maybe be able to allocate resources, but most importantly evaluate educators regularly to ensure that learners achieve quality results, quality is very important.

#### **2 Codes:**

- **Holistic Leadership**

Created by Sasha Jugdav on 8/19/2017

#### **3 Quotations:**

D 1: Transcript of Interview 4 - 1:1 I for one, is able to manage curriculum, monitor lesson plans that the... (731:1067) / D 1: Transcript of Interview 4 - 1:14 if there are those personal clashes here and there we resolve them as... (9716:10132) / D 1: Transcript of Interview 4 - 1:20 I handle it because, I remind maybe the teacher the role of the HOD is... (12568:12709)

- **Instructional Leadership Practices**

Created by Sasha Jugdav on 8/19/2017

#### **3 Quotations:**

D 1: Transcript of Interview 4 - 1:1 I for one, is able to manage curriculum, monitor lesson plans that the... (731:1067) / D 1: Transcript of Interview 4 - 1:5 Policy documents are used, for example curriculum policies. So by doing... (2646:2822) / D 1: Transcript of Interview 4 - 1:7 I'm involved in approving the preparation of lessons for deputy princi... (3706:3983)

---

#### **D 1: Transcript of Interview 4 - 1:2 Open communication with the parents, teachers, learners and stakeholde... (1292:1541)**

Open communication with the parents, teachers, learners and stakeholders at large plays a very tremendous role because issues are ironed out straight away if there are uncertainty, they are ironed out so we do have, uh, conducive learning at the end.

#### **2 Codes:**

## Appendix J

### Project: Instructional Leadership – Transcript 3 –HoD Suburban School

Report created by Sasha Jugdav on 8/12/2017

#### Quotations Report

All (35) quotations

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#### D 1: Transcript 3 - 1:1 making sure that your staff are aware of what's going on, I suppose be... (485:578)

Making sure that your staff are aware of what's going on, I suppose being transparent in a way

##### 1 Codes:

###### ○ Adequate Communication

Created by Sasha Jugdav on 8/12/2017

##### 3 Quotations:

D 1: Transcript 3 - 1:1 making sure that your staff are aware of what's going on, I suppose be... (485:578)  
/ D 1: Transcript 3 - 1:3 so being transparent in, you know obviously you can't always tell them... (1279:1356) / D 1: Transcript 3 - 1:4 I think it's important that they are up to date and informed and know... (1698:1891)

---

#### D 1: Transcript 3 - 1:2 I think across the board with absolutely everything (984:1034)

I think across the board with absolutely everything

##### 1 Codes:

###### ○ Holistic Leadership

Created by Sasha Jugdav on 8/12/2017

##### 2 Quotations:

D 1: Transcript 3 - 1:2 I think across the board with absolutely everything (984:1034) / D 1: Transcript 3 - 1:30 say let's not have end of term pressure beginning of the term, we shou... (30741:31028)

---

#### D 1: Transcript 3 - 1:3 so being transparent in, you know obviously you can't always tell them... (1279:1356)

So being transparent in, you know obviously you can't always tell them exactly

# Project: Instructional Leadership transcript 2- HoD Township School

Report created by Sasha Jugdav on 8/27/2017

## Quotations Report

All (46) quotations

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### D 1: Transcript of Interview 6 - 1:1 I think instructional leadership means the instruction that I give to... (567:675)

I think instructional leadership means the instruction that I give to my team, the teachers that are under me

#### 1 Codes:

##### ○ Leading and Managing the Curriculum

Created by Sasha Jugdav on  
8/27/2017

#### 6 Quotations:

D 1: Transcript of Interview 6 - 1:1 I think instructional leadership means the instruction that I give to... (567:675) / D 1: Transcript of Interview 6 - 1:2 everything that concern the child, everything that concern the parent,... (765:881) / D 1: Transcript of Interview 6 - 1:5 We have curriculum coverage reports so...we have cycles in term, we have... (1721:1865) / D 1: Transcript of Interview 6 - 1:24 Yes, we do, I do, I do. I also go to their classes. There's curriculum... (7222:7434) / D 1: Transcript of Interview 6 - 1:39 Yes, they are progressing well. The results are satisfactory (14455:14514) / D 1: Transcript of Interview 6 - 1:41 I also give them feedback. There's a teacher who always the first one... (15669:15815)

---

### D 1: Transcript of Interview 6 - 1:2 everything that concern the child, everything that concern the parent,... (765:881)

Everything that concern the child, everything that concern the parent, everything that concern the school as a whole.

#### 1 Codes:

##### ○ Leading and Managing the Curriculum

Created by Sasha Jugdav on  
8/27/2017

#### 6 Quotations:

D 1: Transcript of Interview 6 - 1:1 I think instructional leadership means the instruction that I give to... (567:675) / D 1: Transcript of Interview 6 - 1:2 everything that concern the child, everything that concern the parent,... (765:881) / D 1: Transcript of Interview 6 - 1:5 We have curriculum coverage reports so...we have cycles in term, we have... (1721:1865) / D 1: Transcript of Interview 6 - 1:24 Yes, we do, I do, I do. I also go to their classes. There's curriculum... (7222:7434) / D 1: Transcript of Interview 6 - 1:39 Yes, they are progressing well. The results are satisfactory (14455:14514) / D 1: Transcript of Interview 6 - 1:41 I also give them feedback. There's a teacher who always the first one... (15669:15815)

# Project: Instructional Leadership Transcript 5 HOD- Inner City School

Report created by Sasha Jugdav on  
8/27/2017

## Quotations Report

All (32) quotations

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### D 1: Transcript of Interview 5 - 1:1 Hmm...instructional leadership includes management and leadership functi... (351:458)

Hmm...instructional leadership includes management and leadership functions that influences school activities

#### 1 Codes:

- **Leading and Managing the Curriculum**

Created by Sasha Jugdav on  
8/27/2017

#### 9 Quotations:

D 1: Transcript of Interview 5 - 1:1 Hmm...instructional leadership includes management and leadership functi... (351:458) / D 1: Transcript of Interview 5 - 1:2 all work is done, all work it's in par, teaching is effective (827:888) / D 1: Transcript of Interview 5 - 1:4 I give them work (1345:1361) / D 1: Transcript of Interview 5 - 1:5 lesson plan (1413:1424) / D 1: Transcript of Interview 5 - 1:6 I check if the lesson plan is correct, I sign (1427:1472) / D 1: Transcript of Interview 5 - 1:7 I facilitate (1573:1585) / D 1: Transcript of Interview 5 - 1:8 I monitor that (1747:1761) / D 1: Transcript of Interview 5 - 1:20 We agree on what we going to do and then amongst ourselves there are t... (6535:6653) / D 1: Transcript of Interview 5 - 1:28 Yes, I call the meeting, after calling the meeting, I don't name and s... (9995:10338)

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### D 1: Transcript of Interview 5 - 1:2 all work is done, all work it's in par, teaching is effective (827:888)

all work is done, all work it's in par, teaching is effective

#### 1 Codes:

- **Leading and Managing the Curriculum**

Created by Sasha Jugdav on  
8/27/2017

#### 9 Quotations:

D 1: Transcript of Interview 5 - 1:1 Hmm...instructional leadership includes management and leadership functi... (351:458) / D 1: Transcript of Interview 5 - 1:2 all work is done, all work it's in par, teaching is effective (827:888) / D 1: Transcript of Interview 5 - 1:4 I give them work (1345:1361) / D 1: Transcript of Interview 5 - 1:5 lesson plan (1413:1424) / D 1: Transcript of Interview 5 - 1:6 I check if the lesson plan is

correct, I sign (1427:1472) / D 1: Transcript of Interview 5 - 1:7 I facilitate (1573:1585) / D 1: Transcript of Interview 5 - 1:8 I monitor that (1747:1761) / D 1: Transcript of Interview 5 - 1:20

We going to do and then amongst ourselves there are t... (6535:6653) / D 1: Transcript of Interview 5 - 1:28

Yes, I call the meeting, after calling the meeting, I don't name and s... (9995:10338)  
agree on what we

---

## **Appendix K**

**53, King Edward Street  
Kensington 2094  
Johannesburg**

### **Editors Letter: To Whom It May Concern.**

I am a former Wits University Senior Staff member, (25, years). I have been a member of the Wits University Editing Panel for many years (Refer: Dr Pamela Nichols – 011 717 4136/083 233 5270) who is the Director of the Wits University Writing School.

I edit academic and professional papers for students, PhD candidates and faculty members from across the académie. I am a professional Academic and Commercial Editor and have been for more than 12 years.

With regards to the research paper\* written by Ms Cheryl Jugdav, Student number 333008, Protocol number 2016ECE058M, Supervised by Dr Geeta Motilal, in partial fulfilment of the requirements of a Master's Degree in the School of Education, Faculty of Humanities, University of the Witwatersrand.

\*"Exploring the Role of Foundation Phase Heads of Department as Instructional Leaders in three Primary Schools in Gauteng: Implications for Teaching and Learning"

I edited Chapters 1 – 6 of the above paper in February 2018.

In terms of the authors writing, I found this to be of a satisfactorily proficient standard, with a competent descriptive tenor, I found the overall academic writing style, grammar and spelling to be of a high standard and the overall quality of the work presented to be high.

I am yours sincerely

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