

**THE MANAGEMENT OF LEARNING AND TEACHING SUPPORT MATERIALS IN  
PUBLIC SCHOOLS: A COMPARATIVE STUDY**

**By**

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Submitted in partial fulfilment of the Master of Education (M. Ed) in the discipline Educational Leadership, Management and Policy, School of Education, College of Humanities, University of KwaZulu-Natal

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**DATE SUBMITTED:** DECEMBER 2015

1 April 2015

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Dear Mrs Phakathi

Protocol reference number: HSS/0217/015M

Project title: The management of learning and teaching support materials: A comparative study of two school categories

**Full Approval – Expedited Application**

In response to your application received on 11 March 2015, the Humanities & Social Sciences Research Ethics Committee has considered the abovementioned application and the protocol have been granted **FULL APPROVAL**.

Any alteration/s to the approved research protocol i.e. Questionnaire/Interview Schedule, Informed Consent Form, Title of the Project, Location of the Study, Research Approach and Methods must be reviewed and approved through the amendment/modification prior to its implementation. In case you have further queries, please quote the above reference number.

**PLEASE NOTE:** Research data should be securely stored in the discipline/department for a period of 5 years.

The ethical clearance certificate is only valid for a period of 3 years from the date of issue. Thereafter Recertification must be applied for on an annual basis.

I take this opportunity of wishing you everything of the best with your study.

Yours faithfully

  
.....  
Dr Sheruka Singh (Chair)  
Humanities & Social Sciences Research Ethics Committee

/pm

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**DECLARATION**

I, Elsie Namisile Phakathi, declare that:

- (i) The research reported in this dissertation, except where otherwise indicated, is my original work.
- (ii) This dissertation has not been submitted for any degree or examination at any other university.
- (iii) This dissertation does not contain other persons' data, pictures, graphs or other information, unless specifically acknowledges as being sourced from other persons.

## **DEDICATION**

**This piece of work is dedicated to my late mother, a prayerful woman of God, Mrs Alice Gambu. I am what I am today because of her prayers and financial support. I also dedicate this work to my beautiful girls Zenande and Zonqoba Phakathi, “Girls take off where mom ended and excel”.**

## **ACKNOWLEDGEMENTS**

**I would like to express my sincere gratitude to the following people:**

- **Firstly God Almighty for His everlasting mercies. Holy Spirit for continuous support.**
- **My loving Husband, Thokozani Phakathi, for continuous support and understanding. My two beautiful girls Zenande and Zonqoba Phakathi for support and understanding of my absence in their lives for two years.**

- **My supervisor, Dr Naicker, for his expert and excellent supervision.**
- **The participants of this study, who sacrificed their time and respond to interviews and shared valuable information.**
- **My friend Zamo Ncokwana for continuous support and assistance.**
- **Kitty Sokhela, Andile Ngidi, Hlo Ngwenya, Mbuso Mngomezulu, Mr Ngidi (my principal) thank you so much for your contributions towards the success of this dissertation.**
- **My extended family for their prayers, support and understanding.**

## **ABSTRACT**

In South Africa a large percentage of the financial allocation to schools is earmarked annually to procure learning and teaching support materials (LTSM) in public schools both section 20 and 21 schools. All public schools are mandated to manage state funds effectively and spend their LTSM budget allocation according to Department of Education prescribed requirements. The study aimed to explore the role of the School Management Team (SMT) in the management of LTSMs in schools. The study sought to achieve three objectives: firstly, to examine the role of the SMT in the management of textbooks in schools. Secondly, to understand the challenges faced by SMT in the management of textbooks in schools. Thirdly, to understand how challenges are addressed in schools. The study is underpinned by two theories, namely strategic management theory and resourced based theory.

Methodologically, this study adopts a case study research design. The data was generated through semi-structured interview and document reviewed in the form of LTSM retrieval policy was used. The data was analysed using thematic approach. The study's findings reveal that the SMT comprises the LTSM committee. The LTSM committee is responsible for the procurement and management of textbooks in schools. Findings also pointed to a number of challenges. One key challenge was inadequate LTSM budget allocation. The study concluded that there is no effective implementation of LTSM policy in schools. This study recommended that the School Governing Body (SGB) needs to monitor the work of the LTSM committee in the implementation of LTSM policy in schools. Further, the LTSM committee must be accountable to the SGB and the Department of Education regarding how LTSMs are managed in schools

## **ACRONYMS**

DoE	Department of Education
HoD	Head of Department
HRM	Human Resource Management
KZN DoE	KwaZulu-Natal Department of Education
NNSSF	National Norms and Standards for School Funding
RSA	Republic of South Africa
SASA	South African Schools Act, 84 of 1996

**TABLE OF CONTENTS**

<b>TOPIC</b>	<b>PAGE</b>
<b>COVER PAGE</b>	<b>i</b>
<b>ETHICAL CLEARANCE</b>	<b>ii</b>
<b>SUPERVISOR'S STATEMENT</b>	<b>iii</b>
<b>DECLARATION</b>	<b>iv</b>
<b>DEDICATION</b>	<b>v</b>
<b>ACKNOWLEDGEMENTS</b>	<b>vi</b>
<b>ABSTRACT</b>	<b>vii</b>
<b>ACRONYMS</b>	<b>viii</b>

<b>CHAPTER ONE: BACKGROUND AND ORIENTATION TO THIS STUDY</b>	1
1.1 Introduction	1
1.2 Problem statement	3
1.3 Purpose and rationale for the study	4
1.4 Significance of the study	5
1.5 Aim and objectives of the study	5
1.6 Critical research questions	5
1.7 Definition of key concepts	6
1.7.1 Management	6
1.7.2 Learning and teaching support material	6
1.8 Organisation of the study	7
1.9 Chapter summary	7
<b>CHAPTER TWO: LITERATURE REVIEW AND THEORETICAL FRAMEWORK</b>	8
2.1 Introduction	8
2.2 The policy landscape on LTSM	8
2.2.1 South African Schools Act no 84 of 1996	8
2.2.2 National Norms and Standards for School Funding	10
2.2.3 LTSM Policy	11
2.2.3.1 School LTSM committee	11
2.2.3.2 Provision and procurement of resources	12
2.2.3.3 Acquisition process	14
2.2.3.4 Requisitioning process	14
2.2.3.4.1 Requisitioning process for section 20 schools	14

2.2.3.4.2 Requisitioning process for section 21 schools	14
2.2.3.4 Retrieval Policy	15
2.3 The management of LTSM in schools	16
2.4 Challenges in the management of LTSM in schools	20
2.5 LTSM influences on learner outcomes	23
2.6 Theoretical framework	25
2.6.1 Strategic management theory	25
2.6.2 Resource-based theory	25
2.7 Chapter summary	27
<b>CHAPTER THREE: RESEARCH DESIGN AND METHODOLOGY</b>	28
3.1 Introduction	28
3.2 Research Paradigm	28
3.3 Research design	29
3.4 Data generation methods	30
3.4.1. Interviews	30
3.4.1.1 Semi-structured interviews	31
3.4.1.2 Piloting interviews questions	31
3.5 Document Review	32
3.6 Sampling	32
3.7 Research site and participants	33
3.8 Data analysis procedures	34
3.9 Ethical issues	34
3.10 Trustworthiness	35
3.11 Limitations	36

3.12 Chapter summary	36
<b>CHAPTER FOUR: DATA PRESENTATION, FINDINGS AND DISCUSSION</b>	<b>37</b>
4.1 Introduction	37
4.2 The role of the SMT in the management of textbooks in schools	38
4.2.1 Development of the LTSM policy	38
4.2.2 Composition of the LTSM committee	40
4.2.3 Distribution and retrieval of textbooks	43
4.3 The challenges faced by the SMT in the management of textbooks	46
4.3.1 Inadequate school allocation	46
4.3.2 Parental involvement	49
4.3.3 High rate of defaulters	52
4.3.4 Storage of textbooks	55
4.3.5 Shortage of textbooks	57
4.4 The strategies used to address the challenges encountered	59
4.4.1 Sharing of textbooks	59
4.4.2 Quarterly monitoring of textbooks	61
4.5 Chapter summary	63
<b>CHAPTER 5: SUMMARY, CONCLUSIONS AND RECOMMENDATIONS</b>	<b>64</b>
5.1 Introduction	64
5.2 Summary of the chapter	64
5.3 Conclusions	67
5.3.1 The role of the SMT in the management of textbooks in schools	67
5.3.2 The challenges faced by the SMT in the management of textbooks	68
5.3.3 The strategies used to address the challenges encountered	68

5.4 Recommendations	68
5.5 Chapter summary	69
<b>REFERENCES</b>	70
<b>APPENDICES</b>	
Appendix A: Letters to school principals	78
Appendix B: Consent letter to the participants (school principals)	80
Appendix C: Consent letter to the participants (HODs)	82
Appendix D: Interview schedule	84
Appendix E: Document schedule	86
Appendix F: Turnitin report	87
Appendix G: Permission from Department of Education	88
Appendix H: Language clearance certificate	89

## CHAPTER 1

### ORIENTATION TO THE STUDY

#### 1.1 INTRODUCTION

This study explores the management of textbooks as teaching and learning support materials (LTSMs) in public schools. It compares the role of the school management team (SMT) in the management of LTSMs in Section 20 and Section 21 secondary schools. The *South African Schools Act, 84 of 1996* (SASA) creates categories of public schools: Section 20 and Section 21 schools (Republic of South Africa, 1996b). SASA stipulates that public schools are mandated to manage state funds in terms of Section 20 and Section 21 (Republic of South Africa, 1996b). The distinction between Section 20 and 21 schools can present complications in the management of the public schools. Both Section 20 and 21 schools are expected to spend their LTSM budget allocations according to the Department of Education's prescribed requirements. It is prescribed that schools must spend 60% of the total allocation on teaching and learning support materials, specifically 40% on textbooks, 30% on learner stationery, and 30% on other LTSM, then 40% on Non-LTSM (KZN Department of Education, 2014).

SASA states that public schools that have financial expertise and governance capacity may apply to the Head of Department of the provincial education department for additional functions such as maintaining and improving school property, purchasing of textbooks and educational materials (Republic of South Africa, 1996b, sec. 21). When the school has proven capacity, it is the Head of Department (HOD) who allocates Section 21 status to the school. In Section 21 schools, the Department of Education deposits the school allocation directly into the school's bank account. The schools are able to choose and negotiate prices with the suppliers and that the school may receive ordered goods timeously (Department of Education, 1998). This is an advantage for Section 21 schools because they are able to communicate directly with the suppliers and ensure that books are delivered on time. Unlike in the Section 20 schools, the schools depend on district officials to assist them in the requisitioning of textbooks.

Section 20 schools, unlike their Section 21 counterparts, procure their goods and services according to existing Education Departmental arrangements. Section 20 schools get a letter from KZN Department of Education advising the schools about their financial allocation for

the year (Department of Education, 1998). These letters are normally delivered to the schools at the beginning of the year. Section 20 schools do not receive lump sum allocations into the school bank account, but are only informed of their budget in order to prepare them to understand the actual costs of running the school (Department of Education, 1998). The allocation is kept by the provincial Department on behalf of the school. The schools have to spend the money through the Department of Education. Some disadvantages of being a Section 20 school are that schools are unable to negotiate better prices, discounts and even if the suppliers are inefficient with regard to delivery or executing orders timeously, schools cannot choose suppliers they prefer. The lack of capacity in the district office to process requisitions timeously can mean schools lose their allocation at the end of the year since there is no role-over on unspent budgeted amounts (Mestry, 2004). In my view, being a Section 20 school comes with measures of disadvantages compared to section 21.

The *Educational Laws Amendment Act, 24 of 2005*, which amended section 35 of the SASA, states that there is categorisation of public schools into fee paying and no-fee paying schools (Republic of South Africa, 2005). This policy's implication for financial management of public school is divided into fee paying and no-fee paying schools (Republic of South Africa, 2005). My observation is that most Section 20 schools are no-fee paying and Section 21 schools can either be fee paying or no-fee paying schools. The Act made provision for schools serving the poorest communities in the country to be declared no-fee schools from 2006 (Republic of South Africa, 2005). All parents in a no-fee paying schools are exempted from the payment of compulsory school fees. This implies that no compulsory school fees would be charged in the poorest schools that receive school allocations from government. The policy of no-fee schools forms an important part of the government's strategy to alleviate the effects of poverty and to redress the imbalances of the past. Further, The *Educational Laws Amendment Act, 24 of 2005* allows the SGBs of fee paying schools to levy fees to supplement state resources and do not allow SGBs of no-fee schools to do the same (Republic of South Africa, 2005). In most schools that are no-fee paying schools, teaching and learning resources still need to be supplemented by fund raising activities that bank on donations from parents and community groups, because the LTSM budget allocation is not sufficient to procure enough LTSM. However, in fee paying schools, fees can be used to supplement the LTSMs.

## **1.2 PROBLEM STATEMENT**

The South African education system has undergone extensive change, and the government has attempted to improve provision of educational resources. The KZN Department of Education gives a high priority to the provision of textbooks to all learners to achieve curriculum objectives (KZN Department of Education, 2012). There is a substantial budget that is set aside annually to procure textbooks and the intention is to always reach the minimum standard of one textbook per learner per subject (KZN Department of Education, 2012).

Developing and redistribution of resources to all schools mainly those who were previously disadvantaged should be one of the main objectives of the government. Both Sections 20 and 21 schools are expected to spend their money allocation according to Department of Education prescribed requirements. Section 20 schools are schools that may procure goods and services through the department and schools with no fee status will receive 10% of their monetary allocation as an electronic bank cash transfer (Gauteng Department of Education, 2011). This amount can be used to assist the school with the day-to-day running expenses. Section 21 schools receive the school allocation as a monetary transfer for the functions allocated into the school funds, and must administer it in accordance with the provision of the SASA. The Section 21 schools carry out their own procurement and deal directly with the suppliers and contractors in accordance with standard procurement procedures (KZN Department of Education, 2014). This means that if a school has been allocated function to procure textbooks and stationery, the school will follow the standard procurement procedures declared by the KZN Department of Education in the acquisition of the said items (Department of Education).

According to *HRM Circular 52 of 2012*, it is stipulated that all schools must have adequate curriculum resources that support teaching and learning (KZN Department of Education, 2012). My experience is that every year teachers complain of insufficient teaching and learning resources. Mohono (2010) asserts that the scarcity of teaching and learning resources impact negatively on teaching and learning. This means that there is a shortage of teaching and learning support materials in schools compared to learners enrolled whilst these resources are requested every year in both categories. This study seeks to investigate how schools managed these resources. Since educational resources are scarce and limited, their

management therefore, demands some skills, training, careful planning, supervision, coordination and some degree of control in schools. This study seeks to understand the use and maintenance of the textbooks that are already available in schools.

For the purpose of this study, my main focus will be on textbooks as teaching and learning support material. This study shall explore the role of the SMT in managing textbooks in the Section 20 and Section 21 schools, in no fee paying schools. This study shall investigate the challenges experienced by the SMT in managing textbooks in both categories of schools. The study seeks to understand how come there are always shortages. It seeks to examine if the policies are implemented to manage textbooks in schools. This study seeks to comparatively understand how these schools address challenges to ensure optimal usage of textbooks available.

### **1.3 PURPOSE AND RATIONALE FOR THE STUDY**

This study seeks to understand how the SMTs are managing textbooks in Section 20 and 21 schools. Since the democratic government is providing free basic education and nutrition programme, I have noticed that most schools are now overcrowded. A substantial budget is set aside annually to procure textbooks and the intention is to always reach the minimum standard of one textbook per learner per subject (KZN Department of Education, 2012). However, I have taught and I am still teaching at the school where there is shortage of textbooks and stationery with the problem of over-enrolment of learners in the school. According to my observations, most parents in these schools are very reluctant to buy any of these resources. Parents believe that the government is responsible for supplying their children with all necessary resources. In Section 20 schools with no fee status, there are no fees to supplement educational resources received from the government, as a result not all learners have one textbook per subject.

As an HOD, I have observed that there is no uniform process of monitoring the available resources and requisition of new resources. Every year we receive boxes of textbooks requested. My interest in this study is due to the fact that we receive textbooks every year but it is never sufficient to cater for all learners. All schools should be managing textbooks and other resources effectively to prolong their lifespan and ensure optimal usage. The resources management is a cycle involving obtaining of resources, allocating resources, using and evaluating resources (Mohono, 2010). I believe that schools should effectively manage the

textbooks available. I have also observed that most literature available tends to focus on the management of human and financial resources and not much on teaching and learning resources (Ajiyele & Ikegwuru, 2011; Makopa, 2011) and not much on learning and teaching support materials (LTSMs). I have also discovered that managing learning and teaching support materials is one of the major tasks of every school principal and teachers. Hence, the focus of this study as indicated earlier on is on the role of the SMT in the management of textbooks in Section 20 and 21 schools which are no fee paying schools in Molweni Circuit, in the Pinetown District.

#### **1.4 SIGNIFICANCE OF THE STUDY**

This study hopes to contribute knowledge about how SMTs in schools are managing the textbooks. The SMTs need knowledge and understanding of how to manage and sustain resources available in schools. This research is aimed at highlighting the need for school principals and SMTs to equip themselves with the necessary management skills that will enable them to manage the teaching and learning resources effectively and attain all its educational objectives in Section 20 and 21 schools. This study shall be guided by the following objectives and three research questions outlined below.

#### **1.5 AIM AND OBJECTIVES OF THE STUDY**

##### **Aim of the study**

This study aims to explore the role of the SMT in the management of textbooks in Section 20 and 21 schools.

##### **The objectives of this study are:**

- To examine the role of the SMT in the management of textbooks in schools.
- To understand the challenges faced by SMT in the management of textbooks in schools and why.
- To understand how these challenges are addressed in schools.

#### **1.6 CRITICAL RESEARCH QUESTIONS**

##### **This study explores the following key questions.**

- What is the role of the SMT in the management of textbooks in Section 20 and 21 schools?

- What are the challenges faced by the SMT in the management of textbooks in Section 20 and 21 schools, and why?
- How are the challenges encountered by the SMT addressed in Section 20 and 21 schools?

## **1.7 DEFINITION OF KEY CONCEPTS**

In order to ensure a common understanding of terms, below are the key terms identified with their operational definition as used in this study.

### **1.7.1 Management**

Clarke (2007) emphasises that planning, organizing, guiding, and controlling are essential management functions. These functions that are essential to consider in any management position (Clarke, 2007). A manager must organise these management functions in order to reach the organisation's goals and maintain a competitive advantage. Bush (2011) also states that management is a set of activities directed towards efficient and effective utilization of resources in order to achieve organisational goals. Management refers to the process of coordinating and integrating work activities so that they are completed efficiently and effectively through other people (Mogute, 2013).

### **1.7.2 Learning and teaching support materials (LTSM)**

Teaching and learning resources refers to all the facilities required for effective teaching and learning such as classrooms, desks, playground, fence, textbooks, water and sanitation. Clarke (2007) takes this view further by defining teaching and learning resources as information presented and stored in a variety of media and formats that assists students learning as defined by national, provincial or local curricula. Resource materials refers to the teaching aids or physical tools to support teaching and learning in a school (Manqele, 2012). In other words, teaching and learning resources are everything that assist the teacher to do her/his class work effectively and that assist learners to learn. According to the Gauteng Department of Education (2011) LTSM are all materials that facilitate learning including electronic materials and all learning materials that aid teaching and learning. LTSM includes textbooks or learners' workbooks or teachers' manuals. For the purpose of this study, I shall focus on management of textbooks as learning and teaching support materials.

## **1.8 ORGANISATION OF THE STUDY**

**CHAPTER ONE** has introduced the study. It has provided the background to the study, problem statement, the purpose of the study, significance of the study, objectives of the study, critical research questions, definition of terms, organisation of the study and chapter summary.

**CHAPTER TWO** aims to provide the theoretical framework underpinning this study. Further, it reviews relevant literature on teaching and learning resources. It includes the policy landscape on LTSMs, the management of the LTSMs in schools, challenges in the management of LTSMs in schools and the LTSM influence on learner outcomes.

**CHAPTER THREE** explains the research design and methodology of the study. It shall consist of research paradigm, research approach, research design, sampling, data generation instruments, data analysis methods and limitations of the study.

**CHAPTER FOUR** focuses on data presentation and discussion. The discussions are based on the data generated from the interviews and document analysis.

**CHAPTER FIVE** presents a summary of the study, conclusions and recommendations.

## **1.9 CHAPTER SUMMARY**

This chapter highlighted categories of schools in South Africa and how these schools are funded according to SASA. It further revealed the procurement process of textbooks in both categories of schools. This chapter also presented the problem statement, rationale of the study, aim and objectives of the study, critical questions, definition of concepts, and organisation of the study.

The next chapter shall review related literature of teaching and learning resources and the theoretical framework.

## CHAPTER 2

### LITERATURE REVIEW AND THEORETICAL FRAMEWORK

#### 2.1 INTRODUCTION

The first chapter provided the background and motivation for the study. This chapter reviews literature that covers several aspects of the management of LTSM related to my key research questions, namely:

- What is the role of the SMT in the management of textbooks in Section 20 and 21 schools?
- What are the challenges faced by the SMT in the management of textbooks in Section 20 and 21 schools and why?
- How are the challenges encountered by the SMT addressed in Section 20 and 21 schools?

I commence this chapter by reviewing the policy landscape on LTSM in South Africa in general and the KwaZulu-Natal province in particular. Thereafter, I discuss the management of LTSM in schools. This is followed by the challenges in the management of LTSM in schools. I next explore LTSMs' influence on learner's performance. Lastly, I discuss the theoretical framework underpinning this study namely strategic management theory used as a broad theory and theorised in terms of the Resource-based theory.

#### 2.2 THE POLICY LANDSCAPE ON LTSMS

In this section I will discuss the following policies, *South African Schools Act, 84 of 1996*, the National Norms and Standards for School Funding and LTSM policy.

##### 2.2.1 *South African Schools Act (SASA), 84 of 1996*

The national LTSM norms and standards are underpinned by the responsibility of national and provincial levels of governments to honour the state's duty, in terms of the *Constitution of the Republic of South Africa* (1996) to progressively provide resources to safeguard the right to education of all South Africans (Republic of South Africa, 1996a). The SASA stipulates that the State must fund public schools from public revenue on an equitable basis in order to ensure the proper exercise of the rights of learners to education and the redress of past inequalities in educational provision (Republic of South Africa, 1996b, sec. 34). The SASA

further states that a School Governing Body (SGB) of a public school must take all reasonable measures within its means, such as fund raising, to supplement the resources supplied by the state in order to improve the quality of education (Republic of South Africa, 1996b, sec. 36). The SASA creates two categories, LTSM and Non-LSM (Republic of South Africa, 1996b, sec. 21). LTSM refers to all materials that facilitate learning including electronic material and all learning material that aid learning and teaching for learners. Non-LTSM refer to equipment including furniture other than learner desks and chairs, paper copier machines, telephone sets, fax machine, intercom system etc.

SASA Section 21 creates categories of public schools; Section 20 and 21 schools (Republic of South Africa, 1996b, sec 21). At the inception of SASA, all schools were Section 20. According to the Department of Education (1998) Section 20 schools will receive an allocation in terms of the Resource Targeting List, but they do not receive the allocation in cash. Section 20 schools are required to present a budget to the Department of Education, and purchases will be made against the budgeted items (Department of Education, 1998). The provincial Department will procure goods and services on their behalf according to existing Department arrangements (Department of Education, 1998). Therefore, the Department of Education administers the budget allocation on behalf of each Section 20 school. However, Section 21 schools are regarded as almost equal with self-managing or self-reliant schools (Department of Basic Education, 1998). Section 21 school, instead of having to work through the Department when spending the state allocation, a lump sum transfer is made to it and the school can then negotiate directly with its suppliers (Department of Education, 1998).

SASA stipulates that public schools are mandated to manage state funds in terms of the provisions of Section 20 and Section 21 (Republic of South Africa, 1996b). SASA further states that the public schools that have financial expertise and governance capacity may apply for Section 21 status. The School Governing Body (SGB) may apply in writing to the Head of Education of the Provincial Education Department for additional functions such as maintaining and improving school property (Republic of South Africa, 1996b). When the school has proven capacity, it is the Provincial Head of Department (HoD) who allocates Section 21 functions to schools. At the inception of SASA, all schools were Section 20.

### **2.2.2 The national norms and standards for school funding**

Norms and Standards were developed in terms of section 35 of the SASA which provided for the Minister of Education to determine norms and standards for funding of public schools (Department of Education, 1998). The principal goal of SASA was to provide for a uniform system of the organisation, governance and funding of schools (Republic of South Africa, 1996b). This implies that the norms and standards apply uniformly in all provinces in South Africa. To ensure that children from poor parent communities have the right to education as guaranteed by the *Constitution of the Republic of South Africa*, the national Department of Education (DoE) has introduced a 'no-fee schools' policy (Republic of South Africa, 1996a). The policy involves the exemption of poor parents from payment of mandatory school fees levied in schools in South Africa. The no-fee policy is based on the amended National Norms and Standards for School Funding (NNSSF) (Department of Education, 1998). Section 35 of the amended NNSSF sets criteria for a fair and equitable distribution of state-allocated funding to public schools and provides for a system that places public school learners into national quintiles based on school poverty score. The schools sampled for this study, are 'no-fee paying schools'.

The *Educational Laws Amendment Act, 24 of 2005* introduced a national ranking of schools, which would ensure that learners in relatively poor schools would receive the same allocation regardless of the province in which they were located. Nyanda (2014) explains that the amendment was geared primarily towards addressing provincial inequalities. According to NNSSF all public schools are funded using the Resource Targeting Table (RTT), in terms of which schools are funded on the basis of need (Department of Education, 2005). The RTT lists all public schools in the province and sorts them by the level of poverty prevalent in the school community (Department of Education, 1998). Each school is linked to a specific geographic area. Income, unemployment and the level of education in the community are other factors used to determine the poverty scores of schools (Department of Education, 1998).

Hence, South African schools are divided into five quintiles, the poorest schools are included in quintile 1 while the least poor in quintile 5 (Department of Education, 1998).

**Table 2.1: National quintiles**

Province	1(poorest)	2	3	4	5(Least poor)	Total
Eastern Cape	35%	22%	21%	12%	11%	100%
Free State	31%	15%	20%	19%	15%	100%
Gauteng	11%	11%	27%	27%	24%	100%
KwaZulu-Natal	24%	19%	26%	17%	14%	100%
Limpopo	34%	22%	25%	12%	7%	100%
Mpumalanga	17%	20%	30%	20%	14%	100%
Northern Cape	26%	18%	22%	15%	20%	100%
North West	23%	15%	31%	21%	11%	100%
Western Cape	7%	8%	23%	28%	35%	100%
South Africa	20%	20%	20%	20%	20%	100%

(Gauteng Department of Education, 2012).

### **2.2.3 LTSM policy**

According to the KZN Department of Education (2012) the LTSM policy is a policy developed to ensure the following: firstly that there is an increased access to resources. Secondly, it also ensures that there are sound systems to manage the available resources. Lastly, it also assists to improve learners' performance in all schools through the provision of quality education to all learners.

#### **2.2.3.1 School LTSM committee**

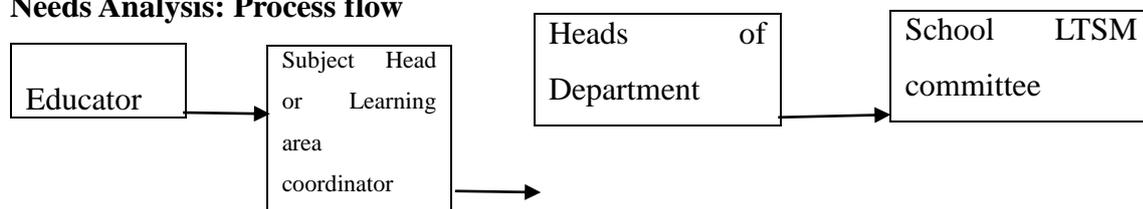
SASA empowers a SGB to establish the LTSM committee in the school (Republic of South Africa, 1996b). According to the KZN Department of Education (2012), the committee should be representative of the school community. The LTSM committee comprises members of the School management team (SMT), senior teachers, phase co-ordinators, educator representative in the SGB and teacher-librarian (KZN Department of Education, 2012). The expectation is that all schools should have LTSM Committees. The LTSM committee has the following functions:

- Create a forum for teachers and learners to have a say in LTSM matters;
- Provide leadership and accept responsibility for the LTSM;
- Help the school to plan for the use of all its resources effectively;
- Ensure proper use, safety and security of the collection when in use by teachers and learners.

Set guidelines for quality acquisition of the resources in line with the requirements of the curriculum to minimise waste which can be incurred in various ways. Such guidelines would inform teachers to identify shortages on particular resources in order to top up for the following year in accordance with the enrolment of the following grades.

Managing resources includes identifying, accessing and controlling resources in the school (Mohono, 2010) which are the functions of the LTSM committee in schools. According to Badalina (2012) the school’s curriculum needs should be established through a consultative process which takes place during the last term of the academic year in preparation for the following year. The need’s analysis process is outlined in figure 2.5

**Needs Analysis: Process flow**



In our school, through communities of learning an educator together with his/her colleagues are able to determine the textbooks they need for their specific subjects. It is then forwarded to the HOD to plan which textbooks to be requested for the following year for the department under his/her management. The HOD needs to submit to the School LTSM committee all textbooks requested for the following year including the quantity. It is stipulated in *HRM Circular No. 52 of 2012*, that schools are only allowed to top-up not buying new textbooks. It is the School LTSM committee who makes a decision on which textbooks are going to be purchased for the entire school. New textbooks can be procured by the schools that have changed their curriculum or new schools that have opened. However, in our schools, the LTSM committee is not functional if it is existing at all hence, the deputy principal executes this activity. The deputy principal receives the list of textbooks requested by the HODs and decides together with the HODs which books are to be purchased for the following year. They are guided by the school allocation for LTSM budget allocation.

**2.2.3.1 Provision and procurement of resources**

The State funding of the public schools in South Africa can be categorised into personnel expenditure and non-personnel expenditure. The non-personnel are often referred to as the

school allocation. The school allocation covers among others, LTSM such as textbooks which are the items directly related to learning (Sayed & Motala, 2012). According to the KZN Department of Education, all public schools shall procure LTSM using their LTSM allocated budget (KZN Department of Education, 2012). School District officials must ensure that orders placed are within the LTSM budget allocation. The apportionment is 40% for textbooks, 30% for stationery and 30% for classroom equipment (KZN Department of Education, 2012). In a special case where a public school wishes to deviate from the mentioned apportionment, a request must be made in writing to the District Director for approval (Department of Education, 2010).

The SGB that have been allocated SASA Section 21 functions may carry out their own procurement (Republic of South Africa, 1996b). They may deal directly with suppliers and contractors for the relevant budgeted items in accordance with standard procurement procedures (Republic of South Africa, 1996b). SGBs must keep documents as evidence of dealing with suppliers and contractors, and records of how the materials and services were used. They are expected to produce such documents or records at the request of officials from the Provincial Education Departments (PED) and for audit purposes (Department of Education, 2010).

At the KZN Education Summit 2015, MEC Ms Nkonyeni declared that they are aware that there are Section 21 schools which do not procure LTSM after receiving their financial allocation. She further admitted that KwaZulu-Natal Department of Education has not achieved book coverage of one textbook per learner per subject (KZN Department of Education, 2014). The other reason mentioned by MEC Ms Nkonyeni is that principals of schools fail to submit requisition forms to the District office in time. This results in shortage of textbooks in public schools in KwaZulu-Natal province.

Section 20 schools, unlike their Section 21 counterparts, procure their goods and services according to existing Education Department arrangements. Different approaches are pursued by PEDs, and a number of improvements to current practice have been proposed (Gauteng Department of Education, 2011). A common approach is for PEDs to procure resources in bulk for schools, relative to the size of the school allocations, and to manage the delivery of items to schools (Gauteng Department of Education, 2011). This approach can involve varying degrees of determination by the schools regarding what resources are procured. A

substantial budget allocation is spent to purchase teaching and learning resources (KZN Department of Education, 2012). Where this approach is pursued, it is imperative that schools receive adequate information regarding the monetary value of the resources they receive.

### **2.2.3.2 Acquisition process**

Schools should ensure that the LTSM and other materials acquired are from the Provincial and National Catalogues only (KZN Department of Education, 2014). Through this process, LTSM can be acquired for curriculum delivery (KZN Department of Education, 2012). Schools are expected to compile a priority list according to their LTSM budget allocation. It is expected by the KZN Department of Education that schools conduct stock-taking to check what they have in stock in order to determine what they need. The school LTSM Committee is responsible for ensuring that quarterly stocktaking is conducted on all distributed and retrieved LTSM (KZN Department of Education, 2012). This process applies to both Section 20 and 21 schools.

### **2.2.3.3 Requisitioning process**

Requisitioning process for Section 20 and 21 schools:

#### **2.2.3.3.1 Requisitioning process for Section 20 schools**

According to Gauteng Department of Education (2011) Section 20 schools are expected to select the materials needed from the provincial and National Catalogues issued by the Department. Schools capture the requisitioned list of resources into the Electronic procurement management system with the assistance of the District officials and the service providers. Completed requisitioning forms are sent to service providers for generating official orders. Schools expend the total LTSM budget allocation (Gauteng Department of Education, 2011).

#### **2.2.3.3.2 Requisitioning process for Section 21 schools**

Section 21 schools also select the materials needed from the provincial and National catalogues issued by the department. Section 21 schools will follow the same procedure as Section 20 schools but Section 21 schools will be allocated with the special grant budget, to facilitate central procurement by the Department. Schools with Section 21 status will be

monitored by the District officials to ensure that LTSM budget allocations are utilised for the purpose they were intended for (Gauteng Department of Education, 2011).

#### **2.2.3.4 Retrieval policy**

The effective monitoring and control over these LTSMs is very essential. The retrieval process remain the provincial competency, however, the compliance management remains the responsibility of the District and the school (KZN Department of Education, 2013). The KZN Department of Education has developed the LTSM Retrieval Policy to ensure that all schools become aware of their responsibilities with regard to the management, utilisation and maintenance of LTSMs (KZN Department of Education, 2013). This is done in such a way that the quality of teaching and learning resources as envisaged by the Department of Education is promoted.

The purpose of the LTSM Retrieval Policy is to regulate and set parameters for effective use of these teaching and learning resources (KZN Department of Education, 2013). The KZN Department of Education (2012) regards teaching and learning resources as essential to the effective running of the education system, hence a substantial budget allocation is spent to purchase teaching and learning resources. It is therefore, imperative that all schools implement the Retrieval policy. Learners need to be more responsible in ensuring that the textbooks that have been loaned to them for the academic year are kept in good condition and returned at the end of the year. According to the KZN Department of Education (2012), the following are principles guiding management, utilisation and maintenance of teaching and learning resources.

##### **1. Value for money**

The Department spends a substantial budget allocation to purchase teaching and learning resources and it is, therefore, necessary that the sum of money spent for the resources brings value to the school communities. The expenditure should warrant tangible results. This practice is even more crucial with the economic downturn which demands that value for money becomes a strategic imperative for everyone to thrive in the current economic environment.

##### **2. Access**

Easy access through proper management (administration, organisation and control) of

resources must be facilitated to provide opportunities for all users i.e. teachers and learners regardless of economic status, gender, sexuality, cultural diversity, IQ levels, personalities and other dividing factors.

### **3. Resource-sharing**

Currently, many schools are characterised by scarcity of teaching and learning resources. The limited resources must then be well looked after and shared among users as much as possible. The lifespan of the resources should be prolonged at all times. For instance, the reasonable lifespan of a book should be five or more years.

### **4. Learner-centred approach**

Teaching and learning resources should be selected /developed/ acquired and used in line with the learner-centred approach espoused in the curriculum documents and policies in order to develop learners' high-order thinking skills, deep conceptual understanding and meaningful engagement with the content at hand.

### **5. Intellectual property**

One of the critical outcomes of the curriculum expects learners to gather and use information effectively. Learners must be guided to use information resources intelligently, always acknowledge original resources to avoid plagiarism and rote learning.

## **2.3 THE MANAGEMENT OF LTSMS IN SCHOOLS**

Clarke (2007) defines management as an activity involving responsibility for getting things done through other people. Bush (2011) also states that management is a set of activities directed towards efficient and effective utilization of resources in order to achieve organisational goals. In the case of a school, the principal as the manager is expected to implement all measures necessary to ensure effective functioning of all activities connected with teaching and learning. Mohono (2010) states that the managerial activities the principal is required to carry out include resource management. This implies that the principal should ensure that the school is able to manage all available resources and acquire new resources. All the above scholars share the view that management is a process of ensuring that organisational or business objectives are attained, and an appeal for managers to plan, organise, lead and control the activities of others.

According to Mohono (2010) planning is the foundation area of management. This means that it is important for a school principal to discuss the plans with the SMT and the staff. In planning for teaching and learning resources at school level, the school principal is required to submit a compiled requisition list of textbooks to the district office in time for procurement. Thus this study seek to investigate how successful the selected schools are in planning for their teaching and learning resources.

Mohono (2010) explains organising as the aim to bring order by arranging or coordinating all activities and resources of the organisation. When the policies are set in place it is important that management committees delegate individuals or groups the responsibility for ensuring that the plans, policies, and procedures are observed. Mohono (2010) further explains that organising is a matter of assigning individuals and groups to responsibilities to blend together to develop one purpose, in order to achieve goals. In our school the principal has delegated the requisitioning of textbooks to the Deputy Principal and the HODs. Each department is expected to adhere to the existing policies on how to manage textbooks in our school. It becomes a productive activity because each HOD is able to control LTSM allocated to his/her specific department.

Controlling includes creating performance standards which are based on the organization's objectives (Mohono, 2010). Managers may be held answerable for the performance of subordinates. The controlling of teaching and learning resources includes among other things drawing criteria to ensure that the school's resources are mobilized effectively, monitoring and evaluating the school's progress.

Mohono (2010) explains that the management of resources entails managing the distribution of resources. To achieve efficiency in resources utilisation, there is also the need to adopt an effective method of resource distribution, utilisation and monitoring of resources entails having an effective "stocktaking". It will inform the School Based Management of what is available in the school (Mohono, 2010). It is important to know the actual resources available in the school. Conradie and Fourie (2011) also argue that stocktaking is an effective and efficient physical programme that keeps track of assets and educational resources at school. Stocktaking must be done annually and stock control or asset register must be up to date before commencing stocktaking (KZN Department of Education, 2013). This is however not happening in our schools. According to my observation HODs are not trained to conduct

stocktaking which leads to this activity being not effectively done in our schools.

Ayeni and Adelabu (2011) observe that school management committee are custodians of school facilities and that it is their responsibility to ensure that all components of the facility are in good working condition, well protected and used for the purpose for which they were acquired. The principal as a member of the SMT should be able to motivate teachers as well as learners in the maintenance of teaching and learning support materials in public schools. Good school leadership should make every effort to provide enabling working conditions for their teachers and learners. All teachers have different positions with different responsibilities. Among the responsibilities that the teachers have is that one of managing resources in schools (Mohono, 2010). I believe that subject teachers are expected to manage the textbooks by distributing textbooks at the beginning of the year and retrieval of textbooks at the end of the year. Agabi (2010) believes that many educational management problems in Nigeria are traceable to inadequate information and a general lack of proper information techniques. The resourcefulness and abilities of the managers can be a major determining factor in the success of an organisation. This is in line with the study conducted by Ajijele and Ikegwuru (2011) on financial resource management capacity of public schools administrators in Ondo State. This study concluded that principals were able to use funds generated from other sources to improve the schools and buy sport equipment. This was through their capacity in preparing and executing the school budget for running programmes. This means that the school principal should be able to raise funds from any other sources than the state.

Olatoun (2012) makes it clear that there is a need for continuous appraisal in public secondary schools to ensure cost effectiveness and prudence on educational resources, just as it is with business and industry sectors. Schools should make thoughtful use of scarce resources, for example textbooks, in ensuring efficiency of the school system. Olatoun (2012) concludes that cost effectiveness in resource management is an important matter. Although textbooks do wear out and require replacement or top-up, they remain a highly cost effective teaching and learning resource.

A research conducted in Nigeria by Bakwai in (2013) examined the resource availability and supply to education sector. The focus of the study was on challenges to effective educational resource planning. Bakwai (2013) suggests that educational planners should raise efficiency

and productivity in the education system so as to contribute the most to national development within the limited resources available. The conclusion was that educational planners needed to be informed of the existence of educational resources and know how to plan the use of those resources in education. Educational managers should be trained to make sure that they have enough knowledge of relevant resources for particular education programmes (Agabi, 2010). This can ensure a general distribution of resources that is fair to all schools irrespective of their location. Olelewe, Nzeadibe and Nzeadibe (2014) concur with Agabi (2010) that due to the general level of poverty in Nigeria, the contributions of rural communities and households to support educational resources have been grossly unimportant.

According to the research conducted by Benjamin and Orodho (2014), teachers in Rwanda, link ineffective teaching and learning, ineffective classroom management and content delivery to the scarcity of resources. The extent to which an educational institution attains her objectives is directly proportional to the educational resources available and their utilisation (Olelewe, Nzeadibe & Nzeadibe, 2014). An organisation is resourceful when it is able to adequately, acquire, rationally distribute, effectively utilize and regularly maintain scarce resources in implementing its programmes. Agabi (2010) defines resourcefulness as the ability to act effectively in the achievement of goals that require the use of resources. Agabi (2010) further states a resourceful education manager is therefore prudent in the application of scarce resources to the implementation of educational policies and programmes.

Many studies maintain that methods of teaching employed by teachers are largely influenced by the resources and facilities in the school (Manqele, 2012). This is supported by William (2011) when he states that the research has upheld that teaching and learning becomes more effective during the frequent and careful employment of resources. It can be said that schools without teachers, textbooks and materials will not be able to do the job of teaching and learning effectively. I believe it is essential for teachers to improvise and network with those schools which are better resourced in order to improve teaching and learning. Manqele (2012) therefore states that the availability and use of teaching and learning resources enable the enrichment of the institutional programmes of the school. It is important to consider the environment where teaching and learning takes place. The environment can be critical in defining the collaboration, team work, the expectation as well as the mutual trust among the stakeholders in a school.

According to Agabi (2010) time is a crucial complementary resource that is essential in the effective control and utilisation of the physical, material, financial and human resources in the school system. He further explains that effective resource management will not be easy to achieve in any school where time is overlooked. The quality and duration of educational resources basically is affected by the way these resources are looked after, and the ways in which they are serviced and repaired in their life.

#### **2.4 CHALLENGES IN THE MANAGEMENT OF LTSMS IN SCHOOLS**

Since 1996 when outcomes based education was introduced in South Africa, in grade one, many rural and under-developed schools still struggle in terms of accessing adequate educational resources. In 2008 National Curriculum Statement was introduced, an outcomes based approach, there were many critiques based on the reason that black schools have large classes and poor resources and therefore, lack the capacity to implement the curriculum (Jacobs, Vakalisa & Gawe, 2004). Therefore, it is important that the available resources are managed in schools.

A study by Mohono (2010) indicated that there are many challenges faced by principals and teachers in managing teaching and learning resources. One of the challenges that Mohono (2010) identifies is that the government is the only source of LTSMs in some public schools. Both section 20 and 21 schools receive a substantial budget from the government for procurement of LTSMs. As indicated before, quintile 4 and 5 schools are able to supplement the funding received from the government by charging the school fees while quintile 1, 2 and 3 schools are unable because they have a status of no fee paying. Therefore, this leaves the Department of Education to be the sole source of income for poor schools.

It is affirmed by Sayed and Motala (2012) when they assert that the level of inequality among the former model C schools and those in rural areas still prevails. According to NNSSF where there is a revised formula of budget allocation; the poorest 40% of schools are receiving 60% of the provincial schooling non-personnel budget allocation and the less poor 20% of schools receive 5 % of the resources (Department of Education, 1998). Poor schools often suffer from having fewer resources, due either to budget limits of inequitable resource allocation among schools (Van der Berg, 2010). Additional resources are important, but it is essential to use the available resources well. The insufficiency of educational resources can hamper effective teaching and learning in schools.

Kwinda (2014) contend in his study that most provinces do not have effective methods to retrieve textbooks from learners. The Department of Education therefore developed the LTSM Retrieval policy to ensure that all schools become aware of their responsibilities with regard to the management, utilisation and maintenance of LTSM (KZN Department of Education, 2013). If textbooks are not recovered from learners at the end of the year, this can mean a significant cost aspect for provincial Departments of Education. The department will be buying the same books the following year than to add or top-up on the available textbooks. In 2001, only 1% of learner's books were retrieved in Limpopo, 55% in Mpumalanga, 90% in Gauteng according to Pillay (2006, cited in Kwinda, 2014). This indicates that there is no uniformity or same results from the implementation of textbooks retrieval policy among provinces in South Africa. Badalina (2012) found that many schools did not have the necessary systems in place for effectively managing physical or educational resources. This means there is no proper guidance on how resources are managed.

However, Kwinda (2014) argues that most schools have systems for retrieval of textbooks but the systems are not efficient and systematic. Although many schools already have textbooks retrieval policy, not all are successful in the retrieval of textbooks from learners at the end of the year. According to Casey (2010) the Western Cape Department of Education provided guidelines and training on textbooks retrieval to schools. Casey (2010) found that although many schools already have textbooks retrieval programme, some schools are not successful in retrieving textbooks from learners at the end of the year. In my experience when a learner has lost a book, the parent cannot afford to pay in order to replace the lost textbook. Another experience is when the subject teacher does not have records of learners who received textbooks at the beginning of the year.

A study by Obonyo (2012) on factors influencing effectiveness of school management in public primary schools in Karemo division, Siaya County established that managerial incompetency; lack of clear roles and responsibilities affected their effectiveness in the management of schools. It is important for SMT members to understand their role in managing resources in order to be effective in their duties. Hence the retrieval policy (KZN Department of Education, 2013) has guidelines of how to manage the available resources in schools. Education sector cannot afford to be wasteful in the use of resources if it is to achieve its goal of producing relevant and educated manpower (Agabi, 2010). He further states that the education system in Nigeria records enormous resource wastages, especially in

the area of human resources and technical science education equipment. Most of these wastages occur as a result of over-utilization while others can be attributed to under-utilization.

One of the most substantial factors contributing to the rise in the cost of education is the cost of textbooks. Kwinda (2014) states that books that are expensive due to the quality of the paper used as well as the methods that are used to bind books. This can also be caused by the fact that these books play a crucial role in the promotion of learning. However, if we try to reduce the price of textbooks the quality might be compromised on the basis of costs. I believe textbooks must be durable, it has to be used by learners for at least a period of three year before it is considering disposing of. In my experience of teaching the textbooks are durable and can last for the stipulated period unless it has been deliberately destroyed by the learner.

Another challenge suggested by Kwinda (2014) is that South Africa's public sector is still characterised by poor implementation of supply chain management practices, a lack of skills and capacity in the implementation of supply chain management. Supply chain management therefore "encompasses the purchasing, storage, negotiation and administration of contracts as well as the inspection and assurance of the quality of materials and services required to bring a product to market" (Gianakis & McCue, 2012, p.110). Hence, the problem of shortage of textbooks persists in the South African education system.

This problem is encountered due to lack of timely delivery of textbooks, recording and storage of textbooks, retrieval of textbooks, purchasing of textbooks and requisition of textbooks (Kwinda, 2014). The issue around the failure to deliver textbooks to schools in Limpopo Province has become a critical point of discussion in South Africa (Kwinda, 2014). The Department of Education is investing heavily towards the improvement of the standards of education in the country. Despite this there are still learners who attend school without all the necessary textbooks, which is the basic source of information for learning. Kwinda (2014) concluded that the failure to provide textbooks to schools is an indication of the failure of Limpopo Province learning material supply chain.

According to Mogute (2013) there is a decline in quality of education as reflected by increasing class repetition and dropout rate in primary grades. Such problems are due to the

shortage of teaching and learning resources among other things. This implies that if these problems are controlled the quality of education is likely to improve.

## **2.5 LTSM INFLUENCE ON LEARNER OUTCOMES**

Learners' academic performance is an aspect of education that has been and still is of great concern to parents, school managers, educational researchers and policy makers in both developing and developed nations. Bearing in mind the cost involved in the provision of LTSM and the substantial research evidence that indicates an indisputable correlation between LTSM and achievement, it is imperative for all schools in the province to apply the retrieval policy without fail for the sake of effective teaching and learning (KZN Department of Education, 2013). This shows the importance of teaching and learning resources in order to assist the academic performance of learners.

Vandiver (2011) shows a positive relationship that exists between availability of facilities and student academic performance. This is supported by Bush and Glover (2009) that it is the responsibility of the principal to ensure that the available LTSMs are adequately utilized in classrooms to enhance learner achievements. Their research further concluded that many schools that had limited LTSMs did not achieve good results.

Many countries view education as a good investment for national development (Akinsolu, 2011). There is an expectation that education can produce the required quantity and quality of human resources for economic growth using the accurate mix of inputs. It is essential to train schools on management of teaching and learning resources in order to achieve quality and efficiency with limited resource but yield the highest returns possible. Kwindu (2014) confirms that learners who attend well-resourced schools, in terms of textbooks tend to achieve better compared to their counterparts who are in schools that are not adequately resourced. However, Bush, Bell and Middlewood (2010) argue that educational resources are managed in order to maximise student learning within given resource limitations. Makopa (2011) concurs with Bush et al. (2010) that some schools with very limited resources have been found to produce some good results. Resources alone may not lead to the intended achievement of results. There can be other key factors in the delivery of the teaching and learning process.

Bush, Bell and Middlewood (2010) suggest that decentralisation is a key contextual factor that influences the relationship between resources and student learning. The responsibility of procuring resources is given to school leaders. This is seen in section 21 schools where the management of resources has been given to SGBs. While section 20 schools are in a much centralised system, the responsibility of procuring resource is with District officials.

Oghuvbu (2009) conducted research on an analysis of resource management in primary schools in Nigeria. The study found that teachers' qualifications and adequate teaching and learning resources are the determinants of assessing academic performance of learners hence, the availability or non-availability of teaching and learning resources affect the academic performance of learners.

In Bongo Nigeria, Yara (2010) pronounced that LTSMs such as textbooks, classrooms, teaching aids, stationery and laboratories affect academic performance of the learners. This is affirmed by Jimenez-Castellano (2008) when he states that educational resources impact school's achievements by promoting or hindering the ability to develop a school culture and high quality instruction. This is indicating that lack of resources prohibits the quality of instructional programme.

Kellagen, Greaney and Murray (2009) argue that to use the information on outcomes of education as the only basis of accountability, however, it can be viewed as the loss of sight. The fact that the aspects of provision of school building, curricular, educational materials, teacher's instructional techniques and preparation activities are also important. The inputs which involve the resources used and the process involved in teaching and learning are not examined (Manjele, 2012). I fully agree, in our schools when the department officials make teachers to account for the performance of the learners at the end of the year, they do not examine the methods and or resources that were used by teachers during their teaching.

The former Minister of Education, Ms Naledi Pandor (2010, p10), emphasised the need for educational resources in schools by arguing that "Anecdotal evidence suggests that the high schools with the worst results are surrounded by primary schools that do not have the resources to teach effectively" (Department of Education, 2010). She further explained that resources do not refer to money; but it may refer to teacher competence, to an inadequate or absence of library. In a statement on the release of the Annual National Assessment (ANA)

the Minister of Education, Mrs Motshekga (2011) pointed out that ANA results have clearly demonstrated that the teachers need an effective monitoring and evaluation system through which the quality of education can be continuously enhanced. From both the Ministers of Education, I can conclude that they do not view the lack of resources such as textbooks as a critical factor which might be contributing to the poor performance of learners.

According to the studies, one of the most cost-effective ways to improve academic performance of learners is to provide quality textbooks (Kwinda, 2014). There seems to be a link identified between the learner achievement and textbooks. Hence it is important that all learners have their textbooks for learning.

## **2.6 THEORETICAL FRAMEWORK**

A ‘theory positions a study in the discipline in which the researcher is working’ (Henning, Van Rensburg, Smit, 2004, p. 25). To examine this phenomenon of management of LTSMs, Strategic Management theory is used as the broad theory underpinning the study. This is because Strategic management is the process and approach of specifying an organisation’s objective, developing policies and plans to achieve and attain these objectives and allocating resources so as to implement the policies and plans (Raduan, Jegak, Haslinda & Alimin, 2009). More specifically, this study is theorised in terms of the Resource Based Theory. This theory attempts to widen the lens through which one examines and understands organisational behaviour.

### **2.6.1 Strategic management theory**

According to Davis (2005) Strategic management can be seen as a combination of strategy formulation, implementation and evaluation. Strategic management according to Sirmon and Hitt (2003) seeks to answer the question ‘Why do some firms perform better than others’. In the context of my study this would mean, why do some schools perform better than others? Davis (2005) explains that the profit-maximising and competition-based theory, the resource-based theory, survival-based theory, the human resource-based theory, the agency theory and contingency theory are common examples of Strategic management theory. For the purpose of this study the Resource based theory will be explained.

### **2.6.2 Resource-based theory**

This theory has recently emerged as an alternative approach to understand industrial

organisations and their competitive strategies. According to Das and Teng (2000) traditional strategy research suggests that firms need to seek a strategic fit between their internal characteristics (strengths and weaknesses) and their external environment (opportunities and threats). In contrast the Resource-based view (RBV) represents a different approach which stresses the internal aspect of a firm. In other words, what a firm possesses would determine what it accomplishes. In the case of this study, the LTSMs available in schools can determine what schools can accomplish. The RBV focuses on the analysis of various resources possessed by the firm. Das and Teng (2000) support the view that a firm should pay more attention to its resources than to its competitive environment. It is important for the school to focus on its available LTSM and use them effectively. So it is important to equip schools to achieve quality and efficiency with the limited resources but yield the highest returns possible.

According to Barney (1991), firm resources include all assets, capabilities, organisational processes, firm attributes, information and knowledge controlled by a firm. These resources enable the firm to conceive and implement strategies that improve its efficiency and effectiveness. It is also important for schools to ensure that there are strategies on how to manage the resources available. The implementation of these strategies needs to be monitored. Contrary to Barney (1991), Fahy (2000) states that the Resource Based views contend that the resources can answer the question, how firms achieved and sustain advantages. This means that an organisation is resourceful when it is able to sufficiently acquire and reasonably distribute the scarce resources.

According to this model, effectiveness is an organisation's ability to secure an advantageous bargaining position in its environment. It capitalises on that position to acquire, judiciously distribute and monitor utilization of scarce resources. This becomes helpful in implementing the organisation's programmes and thus effectively achieving its goals (Deacon & Fiebough, 1988). The section 21 schools are able to negotiate prices.

According to this RBV, a firm is equivalent to a broad set of resources that it owns. Sustained firm resource heterogeneity, thus becomes a possible source of competitive advantage which then leads to economic rents or above normal returns. In other words, what a firm possesses would determine what it accomplishes. The contribution of the RBV is that it develops the idea that a firm's competitive position is defined by a collection of unique

resources. According to Barney (1991) the RBV stipulates that in strategic management the fundamental sources and drivers to firms' competitive advantage and superior performance are mainly associated with the attributes of their resources and capabilities which are valuable and costly to copy. Barney and Arkan (2001, p.24) states that "it is almost as if once a firm is aware of valuable, rare, costly to imitate and non-substitutable resources controls, that the actions it should take to exploit these resources will be self-evident". Therefore, while the resource profile of the firm may be important to performance, these resources must also be integrated and deployed effectively through an appropriate strategy to achieve a competitive advantage (Hitt, Ireland and Hoskisson, 2001). This means teaching and learning resources must be integrated and deployed effectively using an appropriate strategy in order to achieve a competitive advantage.

Also, Sirmon and Hitt (2003) argue that resources alone are not likely to produce a sustainable competitive advantage, rather the resources must be managed appropriately to produce value. This means that in a school situation, not textbooks alone are able to sustain competitive advantage, also human resources are needed. Miller and Shamsie (1996) found that different types of resources explained performance in contrasting environments. For this study, this means that the availability of textbooks is essential towards the performance of learners in schools.

## **2.7 CHAPTER SUMMARY**

In this chapter, the literature related to my study was outlined. This literature has looked at policy landscape of LTSMs, the management of textbooks in schools, the challenges in managing textbooks in schools and the influence of LTSMs on learner performance. Lastly, the chapter concluded with the theoretical framework underpinnings of the study.

In the next chapter, I will discuss the research design and methodology as it relates to my study.

## CHAPTER 3

### RESEARCH DESIGN AND METHODOLOGY

#### 3.1 INTRODUCTION

In the previous chapter a literature review and theoretical framework were discussed. This chapter focuses on the research design and methodology employed in order to seek answers to the following critical questions.

- What is the role of the SMT in the management of textbooks in Section 20 and 21 schools?
- What are the challenges faced by the SMT in the management of textbooks in Section 20 and 21 schools and why?
- How are the challenges encountered by the SMT addressed in Section 20 and 21 schools?

The chapter begins with describing the research paradigm, followed by research design employed in this study in order to achieve the research objectives that I highlighted in chapter one. I will discuss the selection of participants, data generation procedures then data generation and analysing methods used in the study. I will further explain how trustworthiness will be ensured in this study. Lastly, ethical issues and limitations of the study are discussed.

#### 3.2 RESEARCH PARADIGM

A paradigm is a framework within which theories are built, that fundamentally influence how you see the world (Govender, 2011). A paradigm also provides the lens through which the researcher endeavours to understand, make meaning and interpret particular contexts and phenomena. According to Cohen, Manion and Morrison (2011) the world is changeable and it is people who define meaning of a particular situation. This study was located within the interpretivist paradigm. Cohen *et al.* (2011) posit that in the interpretivist paradigm, there is no one truth, but multiple realities exist and people's actions are underpinned by their experiences. Through interpretive paradigm I experienced how people make sense of the context in which they live and work. Interpretive paradigm is sometimes referred to as constructivism because it emphasises the ability of the individual to construct meaning (Cohen *et al.*, 2011; Maree, 2011). I have therefore achieved to understand these experiences through understanding the interpretation and meanings given by the participants (the

principal and HODs) to their actions and not what I assumed to be the meaning (Neuman, 2011). Using this paradigm enabled me to understand specifically how the SMT make sense of their experiences as managers about their role in managing textbooks in Section 20 and 21 schools. The interpretive paradigm was used with the intention of understanding the social meaning of actions on how SMT in Section 20 and 21 schools manage textbooks. Furthermore, the interpretivist paradigm was used in order to understand the challenges, and the strategies employed to address challenges encountered.

### **3.3 RESEARCH DESIGN**

This was a qualitative research and within the interpretivist paradigm. According to Henning, Van Rensburg & Smit (2004) qualitative methods are used to check interpretations and understanding by the participants. Creation of meaning was central to qualitative research. The use of qualitative research allowed me deep interaction with the participants. I interviewed different participants (principals and HODs) in order to find multiple realities as constructed by participants. According to Cohen, Manion and Morrison (2011), qualitative research seeks to explore a particular group and does not generalise the results over the whole population. This study only used a particular group (principals and HODs) therefore the findings cannot be generalised.

In this study, I used a case study as the research design. Yin (2005) defines a case study as an empirical inquiry that investigates a contemporary phenomenon within a real-life context, when the boundaries between phenomenon and context are not clearly evident and in which multiple sources of evidence are used. Case studies might utilise multiple methods and sources of data in order to generate more descriptive data. Hence, interviews and document analysis were used in this study. Cohen, *et al.* (2011) assert that case study produces thick contextual description of events or phenomenon under study. The descriptive findings were drawn from the informant's perspective (which were participants) of the phenomenon. Case studies are set in temporal, geographical, organisational, institutional and other contexts that enable boundaries to be drawn around the case. The study was conducted in two secondary schools in the Molweni ward and Section 20 and 21 schools. Maree (2011) asserts that the typical characteristics of a case study is that, interpretivist strive towards a comprehensive understanding of how participants (SMT members) relate and interact with each other in a specific situation (in the school) and how (SMT members) make meaning of a phenomenon

(managing textbooks) under study. Case studies are normally conducted within the naturalistic, interpretive paradigm (De Vos *et al.*, 2011) and this study limits itself with the interpretive paradigm. One of the features of case studies is that the researcher had no control over the context and the phenomenon that is studied. This suggests that a case study may be defined with reference to characteristics defined by individuals and groups involved in the case. In this study I had no influence over the participants under study and only its participants had a strong influence on what was happening within it.

Rule and John (2011) emphasise using a case study as a methodology in qualitative research. A case study allows the researcher to examine a particular instance with a great deal of depth as opposed to looking at multiple instances superficially. In this study the phenomenon of interest was the management of textbooks. The management of textbooks covered procurement of textbooks, distribution, storage and retrieval of textbooks. Rule and John (2011) highlight an important advantage of using the case study design and that is manageability. Furthermore, Rule and John (2011, p.8) state that “the singularity of focus of a case study can make it more manageable than a large-scale survey”. In this study, I used only two secondary schools cases covering Section 20 and Section 21 and no-fee paying schools. It made it easy for me to manage these cases considering the vastness of the Molweni Circuit.

### **3.4 DATA GENERATION METHODS**

Interviews and document review were used as data generation methods in this study.

#### **3.4.1 Interviews**

“An interview is a two-way conversation in which the interviewer asks the participants questions to generate data and to learn about the ideas, beliefs, views, opinions and behaviours of the participants” (Nieuwenhuis 2014, p. 87). In this qualitative study I interviewed participants in order to find multiple realities as constructed by participants. Open-ended questions were used so that participants may provide insight into events and their own perceptions of the phenomenon being studied (Nieuwenhuis, 2014). Furthermore, Cohen *et al.* (2011) contend that an interview is a good data collection tool for finding out what a person knows (knowledge and information), what a person likes or dislikes (values and preferences) and what a person thinks (attitudes and beliefs). This means that the

interviewee will reflect on their own behaviour or beliefs and report these to the interviewer. The interviews provided me with information about the SMT member's practices and their beliefs and attitudes towards managing the textbooks in Section 20 and 21 schools. Maree (2011) distinguishes between types of interviews namely; semi-structured, telephone, focus group, standardised, ethnographic interview etc.

#### **3.4.1.1 Semi-structured interviews**

In this study, semi-structured interviews were used. A semi-structured interview is defined by Nieuwenhuis (2014) as predetermined questions used to guide the interview. Semi-structured interviews allowed me to guide participants back to the focus of the interview if unimportant aspects emerged. Data was generated using semi-structured interviews because they are flexible, allowing new questions to be brought up during the interview as a result of what the interviewee says (Rule & John, 2011). The majority of questions were created during the interview, allowing both the interviewer and the person being interviewed the flexibility to probe for details or discuss issues. I used the interview schedule as data generation instrument. The interview schedule covered questions on planning, distribution, maintenance and control of textbooks in Section 20 and 21 schools. To set up the interviews I visited the sampled schools a week before the scheduled interviews. This was done to build relationships with the participants and further explain the purpose of the study. The duration of the interviews largely depended on how the participant understood the questions and the depth that I probed for after the respondent's initial responses. Interviewing is a good method to use for gaining in-depth data from a small number of people, in this case, the principal and two HODs only from each school. A voice recorder was used to record all the interviews.

#### **3.4.1.2 Piloting interview questions**

I piloted the possible interview questions with the HODs. Cohen *et al.* (2011) suggest that piloting can be done to check if all questions and instructions are clear. The rationale behind this exercise was to determine whether the relevant data can be obtained from the participants. It assisted me to remove certain items which did not yield usable data.

### **3.5 DOCUMENT REVIEW**

Nieuwenhuis (2014) states that use of documents as a data gathering technique makes the researcher to focus on all types of written communication that may shed light on the phenomenon being investigated. Written data sources may include published or unpublished documents or any document that is connected to the investigation. The following documents were reviewed; school retrieval policy, textbooks retrieval lists. The purpose of examining these records as primary sources (Nieuwenhuis, 2014) was to complement the data obtained from the interviews. I requested the above documents for a three-year period that was from year 2012 to 2015. I was able to get the school retrieval policy from Section 20 school and I was not given the minutes of the LTSM committee. In the Section 21 school I reviewed the textbooks retrieval lists.

### **3.6 SAMPLING**

“Sampling involves making decisions about which people, setting and behaviour one wishes to make use of for the purpose of the research” (Bertram, 2010, p. 41). The main types of sampling in qualitative research are random or probability, purposive or non-probability and stratified sampling (Cohen, Manion & Morrison, 2011). In this study a purposive and convenience sampling was used. In purposive sampling a particular case is chosen because it demonstrates some characteristics that are of interest for a particular study (De Vos *et al.*, 2011). According to Nieuwenhuis (2014) purposive sampling simply means that participants are selected because of some defining characteristics that make them the holders of the data needed to answer the research questions for the study. I selected one Section 20 and one Section 21 schools in order to compare how textbooks were managed. I conveniently selected two secondary schools in the Molweni ward because I also teach in a secondary school in the Molweni ward. From cost perspective this was convenient. SMT members (principals and HODs) were also purposively chosen because of their responsibility and experiences as managers and were a small group of participants to work with. Clarke (2007) declares that management is about ensuring that all systems work effectively. I believe the SMT management function is to plan, organise and control all resources available in the school. I also believe that if the SMT members (Principals and HODs) have a clear understanding of their role in the management of textbooks, it will be easy for them to support and monitor the teachers to manage these resources effectively.

Selection of two HODs from two secondary schools was convenience sampling.

Convenience sampling is sometimes called opportunity sampling (Cohen *et al.*, 2011) as it involves choosing those who happen to be available and accessible at the time. Both schools have four HODs but I used the two HODs who were accessible during the time of conducting interviews. I am aware that this sample does not seek to generalize about the wider population.

### 3.7 RESEARCH SITE AND PARTICIPANTS

This research was conducted in two secondary schools, Sections 20 and 21 in the Molweni Ward. Pseudonyms were used in order to maintain the anonymity of the participants. The names of the sampled schools are: Toyota Secondary school, with Section 20 status and Volkswagen Secondary school, with section 21status. Both schools are in the Molweni Ward, within Ethekewini Metro approximately of 15 kilometres from Hillcrest. These two schools are situated in a semi-rural area.

**Table 1: background and biographic information of all participants**

Research sites	Participants	Position	Age	Higher Education qualification
Toyota Secondary (Section 20)	Mr Fortuner	The principal	41	Master of Education
	Mrs Hilux	HOD	46	B. Ed Honours
	Mr Corolla	HOD	42	B. Ed Degree
Volkswagen Secondary (Section 21)	Mr Amarok	The principal	53	B. Ed Honours
	Mrs Jetta	HOD	46	B. Ed Honours
	Mr Tiguan	HOD	47	B. Ed Honours

### **3.8 DATA ANALYSIS PROCEDURES**

Data from semi-structured interviews were analysed qualitatively. Thematic content analysis was used to analyse the data generated from interviews. The way of analysing data from interviews, was to have the interview tape-recorded and to be transcribed. I transcribed each interview verbatim. According to Cohen *et al.*, (2011) the researcher needs to make sense of the data in terms of participants' definition of the situation, noting patterns, themes, categories and regularities. I used thematic analysis in order to identify core themes from the recorded and transcribed interviews. Thematic analysis is a method for identifying and analysing and reporting themes within data (Nieuwenhuis, 2014).

Rule and John (2011) assert that the process of working from codes to themes is common in case study research and is the essence of what is called content analysis. "Content analysis refers to words, meanings, pictures, symbols, ideas, themes or any message that can be communicated" (Neuman, 2011, p. 322). Thus, content analysis used in this study to analyse the meaning that were obtained from the document analysed. Thus, the following documents were analysed; school retrieval policy, textbooks retrieval lists, minutes of the LTSM committee.

### **3.9 ETHICAL ISSUES**

Ethics in research is very important, particularly with research involving human hence, ethical issues should be taken into account (Cohen *et al.*, 2011). According to Rule and John (2011, p.112) "research ethics, which are developed and embraced by a community of scholars, govern and guide the practices of researchers". As the researcher, I was ethically bound to ensure participants' privacy, confidentiality, anonymity and acceptance of responses and viewpoints. Cohen *et al.* (2011, p. 85) define ethics as "...a matter of principled sensitivity to the rights of others." This highlights the importance of protecting the rights of the participants. In order to comply with the ethical requirements as stipulated by the University, I obtained the ethical clearance certificate from the University of KwaZulu-Natal (see attached appendix iv). I was also granted permission by the KZN Department of Education to conduct the study in both schools (see attached appendix G). Principals from both schools granted me the permission to conduct the research (see attached appendix B).

I acquired informed consent from the participants of this study (Cohen *et al.*, 2011). The participants were told that the information that they provided will be treated confidentially and used only for the study. The participants were also informed of their right to privacy, and I assured the schools that names of the participants will not be published if and when the findings of the research are published. I also assured them that their identity would be protected. In this regard pseudonyms or fictitious names were used instead of the participants' real names. The purpose of the research was explained to all participants as well as their role as participants, and what will be done with the results. I assured them that their participation was voluntary and that they could withdraw from the study at any time and at any stage of the study if they wished to. I also explained to the participants that they will not be remunerated for their participation. (see attached appendices B and C).

### **3.10 TRUSTWORTHINESS**

This is a qualitative study, therefore, trustworthiness was ensured. To enhance trustworthiness in qualitative research the following four issues were taken into consideration: credibility, transferability, dependability and confirmability (Lincoln & Guba, 1985).

#### **3.10.1 Credibility**

Lincoln and Guba (1985, p. 296) assert that credibility is an evaluation of whether or not the research findings represent a 'credible' conceptual interpretation of the data drawn from participants' original data. This involves stakeholder checks (Nieuwenhuis, 2014), the plan was to go back to the participants with the transcripts in order to check if that is what they intended to convey and allow them to comment on data interpretations and findings. To address credibility of this study, the transcripts were given back to the participants to read and verify that whatever was written is accurate.

#### **3.10.2 Transferability**

Transferability refers to the extent to which the findings of one study can be applied in other situations (Shenton, 2004). In my study, I ensured that sufficient information was provided; I attached copies of the interview schedules as an appendix for any other researcher who wants to repeat the study (see appendix D). In this study transferability was ensured by giving detailed information regarding the number of schools sampled, the number of participants involved and the data generation methods employed.

### **3.10.3 Dependability**

Dependability is an evaluation of the standard and quality of all employed processes and means of data generated, data analysis and generation of new theory (Lincoln & Guba, 1985). Dependability in this study implies reliability and showing that the findings are consistent and repeatable. To attend to issues of dependability in this study, triangulation of methods (multiple data generation methods) were employed. Semi-structured interviews and documents review were used as data generation methods in the study.

### **3.10.4 Confirmability**

Lastly, confirmability is the extent to which the findings of a study are shaped and supported by data generated (Lincoln & Guba, 1985). Further, Miles and Huberman (1994) indicate that a key criterion for confirmability is the extent to which the researcher discloses his or her own biasness. In this study my biasness was that I knew that textbooks were not efficiently managed in both sampled schools. In order to promote confirmability in this study, I ensured triangulation in terms of participants and methods (Shenton, 2004).

## **3.11 LIMITATIONS**

Studies are limited by time, access, resources availability and the credibility of the data (Vithal & Jansen, 2006). This was a small scale study with the limited number of participants, principals and HODs. It was a sample of only two secondary schools in the Molweni Ward with 11 secondary school. Therefore, the findings of this study cannot be generalised but limited to these particular schools.

## **3.12 CHAPTER SUMMARY**

In this chapter I have described the research paradigm and design that were employed in this study and provided reasons for my choice. The research design was explained and the reasons for it as well as a discussion of the selection of participants. Also the research instruments and the whole procedures which covered the data analysis, including trustworthiness, ethical issues and limitation of the study were discussed.

The next chapter will present data, discussion and analyse the findings.

## CHAPTER 4

### DATA PRESENTATION, FINDINGS AND DISCUSSION

#### 4.1 INTRODUCTION

The previous chapter outlined the research design and methodology employed in the study. This chapter focuses on data presentation, findings and the discussion of the findings from the data generated through semi-structured individual interviews with the SMT members comprising the school principals and Heads of Department. This chapter also presents the findings generated from the documents reviewed. To ensure confidentiality, the schools and the participants are assigned pseudonyms namely: Toyota Secondary School which has Section 20 status and Volkswagen Secondary School which has Section 21 status. The participants from Toyota Secondary School were the principal, Mr Fortuner, and the HODs, Mr Corolla and Mrs Hilux. From Volkswagen Secondary School it was the principal Mr Amarok, and the HODs, Mrs Jetta and Mr Tiguan. Data generation sought to address the following key questions:

- What is the role of the SMT in the management of textbooks in Section 20 and 21 schools?
- What are the challenges faced by the SMT in the management of textbooks in Section 20 and 21 schools and why?
- How are the challenges encountered by the SMT addressed in Section 20 and 21 schools?

The data presented hereunder is categorised under themes and sub-themes that emerged from the interviews and documents reviewed. In presenting this data, I ensured that the voices of the interviewees were not lost, therefore, *verbatim* quotations are used in the data presentation. Furthermore, I present a discussion of the findings by drawing on literature reviewed and theoretical framework as presented in chapter two. I commence with the theme the role of the SMT in the management of textbooks in schools. Next, the challenges faced by the SMT in the management of textbooks are discussed. Finally, I present the strategies used to address the challenges encountered.

## **4.2 THE ROLE OF THE SMT IN THE MANAGEMENT OF TEXTBOOKS IN SCHOOLS**

This theme encompasses the following sub-themes that emerged from the data: development of LTSM policy, composition of the LTSM committee, distribution and retrieval of textbooks.

### **4.2.1 Development of the LTSM policy**

Interviews revealed that the Section 20 school, Toyota Secondary had a school LTSM policy. The school's LTSM policy was developed by the SMT in consultation with the teachers. Some of the participants like Mr Corolla revealed that the policy was not effective. However, Mr Fortuner indicated that the school LTSM policy was partially effective. He further stated that drawing on the LTSM policy of the Department of Education to develop their own school LTSM policy was difficult. Mr Fortuner mentioned that it was due to the gaps in the LTSM policy of the Department of Education, for example, the LTSM policy of the Department of Education does not give guidelines on how the schools should deal with learners who do not have parents when they lost the textbooks. As a result, some teachers ended up deviating from the school LTSM policy and applying different strategies of managing the textbooks at Toyota Secondary School. It was interesting to note that one participant, Mrs Hilux, was not sure about the existence of a LTSM policy at the school. This may imply that she was also not implementing the school LTSM policy in managing the textbooks for her department.

The principal of Toyota Secondary School, Mr Fortuner, had this to say:

*Yes, we do have the LTSM policy, but there are some gaps with the policy and teachers end up deviating from the policy. It is partially effective. The challenge is marrying the policy and practice ... because it does not address the problems we encounter.*

The HOD of Toyota Secondary School, Mr Corolla, said:

*Yes we do have the LTSM policy, but I cannot say it is effective because some of the teachers are not following it up to a tee. The LTSM policy was formulated by the SMT and the teachers were consulted. For example, the*

*policy stipulates that textbooks must be issued at the beginning of the year. Sometimes teachers take their time to do that.*

This is what Mrs Hilux, the HOD of Toyota Secondary School, revealed:

*We do not have the LTSM policy now, we did have it. If you were to ask me to take it out for you now, I will not be able to do so.*

Participants from the Section 21 school, Volkswagen Secondary School, revealed that their school also had a school LTSM policy. Their school LTSM policy was developed by the SMT at one of the SMT meetings. This suggests that other stakeholders were excluded from the process of developing the school's LTSM policy. It is clearly stated that the school LTSM policy must be developed in line with the guidelines of the Department of Education's LTSM policy which calls for an all-inclusive process. The principal Mr Amarok, stated that the school's LTSM policy was partially effective. Mr Tiguan, the HOD, however disagreed with the principal as he stated that the school's LTSM policy was not maximally assisting the school in the management of textbooks. He seemed to suggest that it was difficult to operationalise the school's LTSM policy.

The principal of Volkswagen Secondary School, Mr Amarok, said:

*The school's LTSM policy was developed when we had the SMT meeting. To a certain extent it is effective, because currently we are making use of it.*

Mr Tiguan, the HOD of Volkswagen Secondary School, shared his sentiments and said:

*Some policies are well developed on paper, but not easy to implement. What I am trying to say is that the policy is supposed to be helping us managing textbooks but it is not [assisting] at a greater degree at the moment.*

Both the Section 20 and 21 schools had formulated the school LTSM policy. In the Section 20 school the SMT had consulted the teachers when formulating the school LTSM policy. However, in the Section 21 school the school LTSM policy was formulated by the SMT. In both schools the school LTSM policy was not fully implemented. It was interesting to note that one of the participants, Mrs Hilux, an HOD did not seem to understand the policy of LTSM initially as she stated that she had never seen the LTSM policy at her school. This contradicted what was stated by the other two participants in the same school, that it was the members of the SMT who were managing the textbooks through the school's LTSM policy.

This could imply that this HOD did not implement the LTSM policy in managing the textbooks in her department.

According to the LTSM policy of the Department of Education (2013), the LTSM policy is developed to ensure that all schools become aware of their responsibilities with regard to the management, utilisation and maintenance of LTSM. Both the Section 20 and 21 schools were aware of their responsibilities with regard to the management of textbooks but the LTSM policy was not fully implemented, hence it was partially effective. Consequently, Kwindu (2014) observes that most schools have systems for management of LTSM but the systems are not efficient and systematic. The majority of participants admitted that the LTSM policy only existed on paper but it was not fully operationalised. However, Mestry and Bodalina (2015) point out that many schools do not have the necessary systems in place for monitoring and controlling assets and physical or educational resources. Evidence from this study indicate that in both schools textbooks were not effectively managed and sometimes not in line with the school's LTSM policy, since one of the participants indicated that they ended up deviating from the developed policy.

#### **4.2.2 Composition of the LTSM committee**

The LTSM committee was composed of the SMT members at Toyota Secondary School (a Section 20 school). All participants confirmed that it was the deputy principal and the HODs who were the members of the LTSM committee. They indicated that the procurement of textbooks was the responsibility to the LTSM committee at Toyota Secondary School. The majority of participants revealed that at this school, the school clerk was assigned some of the duties of the LTSM committee. However, it emerged that some duties delegated to the school clerk were overwhelming for her to perform. It was mentioned by Mr Corolla that the school clerk could not count all textbooks when they were delivered since there were large quantities of boxes that the school received. Therefore, it seems that the school clerk signed for textbooks though she was not certain of the exact quantities received and whether it was the correct order. Mr Fortuner, the principal of Toyota Secondary School said:

*... the way the LTSM committee was designed in our school, we have the deputy principal who is responsible for textbooks and the heads of departments making up the committee.*

Mr Fortuner further explained:

*It is the admin clerk who receives textbooks when they are delivered. Actually the admin clerk is supposed to count the books when they are delivered.*

Mr Corolla stated that:

*... we receive a huge number of boxes in bulk which somehow overwhelms the clerk in terms of being able to count each and every book received. It is hard for her to open all boxes and check if all textbooks are there and the quantities are correct. I believe somehow the school administration clerk ends up signing hoping that she is receiving the correct stock.*

The principal, Mr Fortuner confirmed that:

*It is the school clerk who receives textbooks when they are delivered. Actually the school clerk is supposed to count the books when delivered.*

In the Section 21 school, Volkswagen Secondary the LTSM committee was composed of the SMT members. It was stated by Mr Amarok that it was the deputy principal together with the HODs who were members of the LTSM committee. The principal, Mr Amarok, explained that the HODs were the ones who worked closely with the teachers thus it was the HODs who had to manage the textbooks. It was clear that The LTSM committee understood their role in the procurement of textbooks in their school. It was mentioned by Mr Tiguan that it was the LTSM committee which made a final decision on the quantities of textbooks to be purchased. All participants concurred when stating that some duties of the LTSM committee were delegated to the school clerk. It was also mentioned by Mr Amarok that it was the deputy principal and school clerk who received textbooks and were expected to reconcile the requisition records and invoice of textbooks delivered.

Mrs Jetta, the HOD, stated that:

*It is the SMT members who are responsible for the procurement of textbooks.*

Mr Amarok, the principal, had this to say:

*We discussed as the SMT and we felt that since HODs are working directly with the teachers and it is the HODs who distribute the books, they [HODs] could act as the LTSM committee.*

Mr Tiguan, the HOD, also revealed that:

*It is the LTSM committee which finally decides how many textbooks to be bought and why.*

The principal, Mr Amarok, further explained that:

*According to plan, textbooks are supposed to be received by the deputy principal and the school clerk. Upon delivery they [the deputy principal and school clerk] would take our order records and reconcile them with the stock received.*

Both Section 20 and 21 schools had the LTSM committees which comprised SMT members. This suggests that both schools did not comply with the LTSM policy of the Department of Education, which stipulated how the LTSM committee should be comprised. Participants made it clear that the procurement of textbooks in each school was assigned to and performed by the SMT members. Both schools had the deputy principal and the HODs as the members of the LTSM committee. One of the reasons given by the principal, Mr Amarok was that the HODs are the ones who work closely with the teachers thus it was the HODs who were managing the textbooks. The school clerks executed some of the duties of the LTSM committee in both Section 20 and 21 schools. However, it was clearly stated by Mr Corolla from the Section 20 school that it was a formidable task for the school clerk to receive and count textbooks when delivered. It was indicated that it was both the school clerk and the deputy principal who received the textbooks upon delivery in the Section 21 school. It was also clearly stated by the principal of the Section 21 school that the process of reconciling between the requisition records and invoice of textbooks delivered was done by the deputy principal and the school clerk.

The principal, Mr Amarok, from the Section 21 school revealed that LTSM committee was not a formal committee in his school. When I requested the minutes of the meetings of the LTSM committee, he stated that they discussed LTSM related issues during the SMT meetings. Therefore, they were not comfortable to give me the minutes of the SMT meetings.

The SASA empowers the SGB to establish the LTSM committee in the school (Republic of South Africa, 1996b). Furthermore, the LTSM policy of the Department of Education (2013) clearly states that the LTSM committee is formed by the members of the SMT, senior teachers, phase coordinators, educator representatives on the SGB and a teacher-librarian.

With reference to this policy provision on the composition of the LTSM committee, both schools did not comply with the LTSM policy of the Department of Education when they formed their LTSM committees. Stakeholders like senior teachers, phase coordinators, educator representative in the SGB and teacher-librarians were not the members of the LTSM committee. According to Mestry and Bodalina (2015) the SGBs are mandated to interact with the SMTs and teachers to develop appropriate structures and policies to effectively manage physical resources and educational resources. Although it was not improper for the SMT members to be members of the LTSM committee, it was important for both schools to ensure that other relevant stakeholders were included as per policy provisions of the LTSM policy of the Department of Education.

Mohono (2010) indicates that managing resources including identifying, accessing and controlling resources in the school, are the functions of the LTSM committee. The LTSM committee needs to determine the quantities of textbooks to be purchased. Mohono (2010) further asserts that organising these resources is a matter of assigning individuals and groups to blend together to develop one purpose, in order to achieve goals. It is evident that some of the LTSM committee duties were delegated to the school clerks in both sections 20 and 21 schools.

#### **4.2.3 Distribution and retrieval of textbooks**

All participants from Section 20 school, Toyota Secondary agreed that it was the role of the SMT members, who in this case formed the LTSM committee to plan, distribute and retrieve textbooks. The HODs facilitated the planning process through departmental meetings with their respective teachers. One participant, Mr Corolla, stated that subject teachers recommended textbooks to be purchased and the SMT members decided on the quantities of textbooks to be bought. It was the HODs who distributed textbooks to their respective subject teachers and the subject teachers issued them to the learners. Furthermore, Mr Corolla stated that the HODs sometimes did not count textbooks before distributing them to the subject teachers. This implied that sometimes the HODs distributed the textbooks without having accurate figures regarding the numbers of existing stock. The Section 20 school had the LTSM retrieval policy, however, from the participants' responses it was clear that the LTSM retrieval policy was not fully implemented. Mr Fortuner, the principal, stated that the LTSM policy of the Department of Education had many gaps which caused many

challenges for its implementation in their school. Textbooks would be retrieved at the end of the year by the subject teachers.

Mrs Hilux from Toyota Secondary School mentioned that HODs involved the subject teachers during the planning and decision-making processes regarding which textbooks to be purchased. Mrs Hilux had this to say:

*Our SMT's role starts with the requisition. HODs sit down with the teachers and look at the samples from different publishers ... It becomes a decision from all teachers within the department regarding which books are to be bought.*

Mr Corolla pointed out that the HODs were expected to count textbooks before distributing to the subject teachers. Mr Corolla explained:

*Normally when the school begins the HODs will be asked to come and collect the books for their departments. HODs are advised to count their books and distribute to their respective teachers.*

Mr Corolla further admitted that sometimes HODs did not count the textbooks received due to other administration duties they had to perform. This implied that HODs were not sure about the number of textbooks received and distributed by their departments. Mr Corolla stated:

*... HODs end up not doing justice in counting the textbooks and I distribute textbooks to teachers not knowing the actual records of textbooks received.*

Regarding the retrieval of textbooks, Mr Fortuner, had this to say:

*At the end of the year, after the exams teachers would collect the textbooks from the learners and record them. HODs are actually the ones responsible to see if their subjects are covered in terms ensuring if all textbooks have been returned. If a learner fails to return a textbook, a letter is issued to inform the parents. The parents are expected to replace the lost textbook.*

Section 21 school participants pointed out that the HODs convened and monitored the meetings for the planning regarding textbooks to be purchased. It was clear that teachers contributed towards the selection of textbooks to be purchased. The participants, Mr Amarok

and Mr Tigan, revealed that the distribution of textbooks within the school was facilitated and monitored by the HODs. It is in this context that Mohono (2010) argues that the management of resources entails managing the distribution of resources. In the Section 21 school, the textbooks were received by the school clerk and the HODs were expected to distribute textbooks to respective subject teachers and teachers had to facilitate distribution to the learners. It was indicated that Section 21 school retrieved the textbooks at the end of the year. Data revealed that the school had a plan regarding the retrieval of textbooks at the end of the year. Stocktaking was conducted by the deputy principal together with the school clerk at the beginning of the year.

Regarding planning, Mrs Jetta, the HOD of Volkswagen Secondary school, had this to say:

*HODs take catalogues received to the teachers in order to decide which textbooks are to be ordered. This makes it easy for teachers to choose textbooks using the catalogue. I think a lot of input and selection of textbooks lies with the teachers.*

With reference to the distribution of textbooks, Mr Tigan said:

*Only the HODs are permitted to go to the strong room together with the school administration clerk to take out the textbooks. HODs will then distribute textbooks to relevant teachers. Teachers will then distribute textbooks to the learners. HODs will require a list of names of the learners who were given textbooks for record keeping purposes.*

Mrs Jetta explained how textbooks were retrieved:

*As a school we have a year plan where we allocate two days for our learners to return all textbooks they received. Learners will come and return books and come the following day to check if there are any outstanding textbooks. On that day we issue letters to the parents of the learners who did not return all textbooks. This letter informs the parents of the books lost and the price for each textbook. Parents are expected to pay for the textbooks which are lost. The school also allows parents to deposit that amount into the school banking account so that the school can replace the textbooks. Stocktaking is done by the deputy principal and school clerk at the beginning of the year.*

It was clear that from both Section 20 and 21 schools that the LTSM committee was responsible for planning, distribution and retrieval of textbooks. It was mentioned by the majority of participants from both schools that teachers were consulted during the planning stage of the procurement of textbooks. The HODs were responsible for management of the distribution of textbooks in both schools. Textbook retrieval was done at the end of the year in both Sections 20 and 21 schools. It was stated that in both schools, if the learner did not return the textbooks a letter was issued to inform the parents, as they were expected to pay for such textbooks.

According to the LTSM policy of the Department of Education (2013), the LTSM committee is responsible for ensuring that stocktaking is conducted on all distributed and retrieved LTSM. This is confirmed by Agabi (2010) who emphasises that education managers should be trained to ensure that they have adequate knowledge of relevant resources for particular education programme. This may ensure a general distribution of resources that is fair. In a school a fair distribution of textbooks in all grades is necessary. In order to use the teaching and learning resources effectively one has to plan how to use them. The stocktaking should be conducted to reconcile what appears in the asset register and the actual available resources. Conradie and Fourie (2011) argue that stocktaking is an effective and efficient physical programme that verifies the validity and correctness of the numbers of stock items on hand. The majority of participants stated that stocktaking was conducted at the beginning of the year. Stocktaking was the responsibility of the school clerk and deputy principal in both schools.

The above discussion is in line with the Resource-based theory from which the study draws. The Resourced-based view (RBV) stresses the internal aspects of the firm. Das and Teng (2000) support this view that a firm should pay more attention to its resources than to its competitive environment. The schools need to focus on their available textbooks and use them efficiently and judiciously. Therefore, it is important for the schools to ensure that there are strategies on how to manage the resources available and ensure that those strategies are fully implemented.

### **4.3 THE CHALLENGES FACED BY THE SMT IN THE MANAGEMENT OF TEXTBOOKS**

It emerged from the interviews that there were a number of challenges faced by the SMT in managing the textbooks in both Section 20 and 21 schools. The sub-themes that emerged

were: inadequate LTSM budget allocation, parental involvement, rate of defaulters, storage of textbooks and shortage of textbooks.

#### **4.3.1 Inadequate LTSM budget allocation**

It emerged from the interviews at Toyota Secondary (Section 20 school), that the LTSM budget allocation was not sufficient to procure the required quantity of textbooks. The procurement of sufficient textbooks was limited by the LTSM allocation as per the funding provision of the Department of Education. There was no supplementary funding that was received by the school from other sources for the procurement of textbooks. It was revealed by Mrs Hilux that not all learners had textbooks for every subject in their school.

Mr Fortuner had this to say:

*When we are given an allocation that is where the problem starts. Most of these problems are associated with that. We would be given an allocation of money and the assumption is that amount will cover everything. It does not cover everything.*

Mrs Hilux, the HOD of Toyota Secondary School, concurred with Mr Fortuner and said:

*The Department of Education intends for every learner to own a textbook. That is impossible because the allocation for LTSM is not sufficient. Not all learners have textbooks.*

Section 21 school participants declared that the LTSM budget allocation was not sufficient to procure the required quantity of textbooks. The Section 21 school principal, Mr Amarok, explained that when the 40% of textbook allocation had been exhausted, they were able to further purchase textbooks using 30% allocated for the purchase of other LTSM. This was in line with the LTSM policy of the Department of Education (2010) that in special cases where a public school wishes to deviate from the above policy provisions, a written request must be submitted by the school to the District Director for approval. Mr Amarok further explained that as a result of insufficient LTSM budget allocation, they had to come up with other plans to ensure that they could buy more textbooks.

Mr Amarok explained:

*When allocations are made the department is usually aware of the cost of the textbooks. When you look at the figure allocated to our school you will discover that it is not going to cover all your textbooks required. The allocation for textbooks since it is not enough, you are forced to get the money from somewhere else. We end up having to use the funds that are allocated for Other LTSM which is 30% to buy more textbooks.*

All participants from both Section 20 and 21 schools shared the same sentiments that the LTSM budget allocation in their schools was never sufficient. It was established that both schools, Toyota and Volkswagen Secondary Schools, had state funding as the only financial source for the procurement of textbooks. Unlike Section 20, Section 21 schools were able to request permission from the District office to use 30% allocated for Other LTSM to procure more textbooks. According to SASA the state has an obligation of providing funding and physical resources to public schools (Republic of South Africa, 1996b). The participants from both Section 20 and 21 schools were dissatisfied with the level of state funding particularly for LTSM, because there were learners in both schools who did not have all textbooks.

According to the LTSM policy of the KZN Department of Education (2014) in both Section 20 and 21 schools the school allocation was divided into two parts; 60% LTSM and 40% Non-LTSM of the total allocation. Each Provincial Department of Education prescribes how schools should spend their school allocation. For example, in KwaZulu-Natal Province out of the 60% LTSM budget allocation, 40% is for textbooks, 30% is for stationery and 30% is for Other LTSM (KwaZulu-Natal (KZN) Department of Education, 2014). However, in Gauteng Province, 50% LTSM budget allocation, 40% is for textbooks, 35% stationery, 10% is for library resources; 6% is for laboratory equipment; 5% is for office stationery; 4% is for library material (Gauteng Department of Education, 2012). This suggests that the KwaZulu-Natal Department of Education provides more allocation for LTSM than the Gauteng Department of Education. However, the LTSM budget allocation was said to be insufficient.

Mohono (2010) observes that the government is the only financial source of LTSM in some public schools which is a challenge. The schools could not afford to purchase the quantities of textbooks required. There was a challenge in the involvement of parents in the management of textbooks. Parents were involved by the schools if the learner did not return the textbook at the end of the year. There was a high rate of textbooks defaulters who did

not return the textbooks at all. There was a challenge with storage of textbooks in both schools and it was indicated that they did not have enough space to safely keep and store textbooks. The majority of participants mentioned that there was a shortage of textbooks in both schools. The above challenges largely contributed to the LTSM policy not being fully implemented in schools. According to the LTSM policy, it is imperative for all schools in the province to apply this policy for the sake of effective teaching and learning (Department of Education, 2010).

In her speech, the KZN Member of the Executive (MEC) for Education Ms Nkonyeni admitted that the KZN Department of Education has not achieved its textbook coverage target of one textbook per learner per subject (KZN Department of Education, 2015). Bakwai (2013) affirms that educational resource scarcity may be overcome by the ability of educational planners to discover new sources of educational resources. The KZN Department of Education (2015) encourages schools which are experiencing an acute shortage of textbooks, that in addition to the 40% for textbooks allocation, they may utilise the 30% of Other LTSM allocation for the purchase of more textbooks. In these schools under study, the state is the sole financial source for educational resources. According to the findings of the study conducted by Ajileye and Ikegwuru (2011), the principals were able to use funds generated from other sources to improve the educational and physical resources. According to SASA, the SGBs may supplement the state's funding through fundraising initiatives (Republic of South Africa, 1996b). This suggests that SGBs need to facilitate fundraising campaigns in their schools in order to be able to afford procurement of more textbooks.

#### **4.3.2 Parental involvement**

Data from the Section 20 school revealed that, there needed to be continuous involvement of parents in the management of textbooks. Parents were informed and made to account for the textbooks issued to their children at Toyota Secondary School. Such parental involvement is in line with the LTSM Policy which stipulates that parents or guardians must fill in and sign the indemnity form for all resources issued to the learners as part of accountability (KZN Department of Education, 2012). However, it emerged from the interviews that parents were informed when their learners did not return the textbooks to the school at the end of the year at Toyota secondary school. However, not all parents responded promptly and positively to the letters issued. This is what Mr Fortuner had to say:

*We normally issue letters to the parents at the end of the year when we have discovered that the book has been lost, we then involve the parents.*

One of the participants, Mr Fortuner, indicated that it could help if these letters to parents were issued at the beginning of the year. This suggested that the timing of issuing the letters to parents for textbooks not returned created problems for this school. The majority of participants from the Section 20 school were of the same view that parents might show more support in ensuring that the textbooks were looked after by their learners if they were informed at the beginning of the year. This is what Mr Fortuner, the principal, had to say:

*Out timing of issuing these letters somehow compromised the school in a way. If we are able to inform parents at the beginning of the year, I believe parents will give us more support in ensuring that their children return all textbooks.*

Mrs Hilux also shared the same view:

*The timing of issuing these letters to parents is challenged by the fact that some learners immediately after they finish writing their exam, they do not come to school. We are unable to issue letters to their parents informing them about the textbooks which were issued to their learners.*

Mr Corolla, the HOD, pointed out that:

*We are supposed to make parents to sign in terms of saying if the learner loses the book, the parent will be liable to pay and replace the book. Unfortunately, we end up not doing that, hence we just rely on learners. When a learner loses the book it becomes hard for the school to make the parents to pay for the books they were not initially informed about.*

Mrs Hilux of Toyota Secondary School also added:

*Few parents are willing to pay for textbooks*

Mr Fortuner also shared this sentiment:

*The department's assumption is that parents are supportive. The department does not have a strategy for us who are dealing with large number of learners who do not have parents and parents who are not interested in their children's education.*

Data from the Section 21 school, Volkswagen Secondary School, revealed that the parents were involved in the management of textbooks. It emerged from the interviews that parents were informed when their children did not return the textbooks to the school at the end of the year, and requesting parents to pay if the textbooks were lost.

Mrs Jetta, the HOD, added:

*The learners who did not return the textbooks at the end of the year will be given letters to inform their parents of the outstanding textbooks. They will be given a quotation of the amount of each textbook so that the parents will pay if the books are not returned.*

Based on what participants from the Section 21 school alluded to, it further emerged that the parents responded differently to the letters issued. Some parents came to the school and promised to re-pay but they ended up not honouring their commitment, possibly due to unaffordability as it was mentioned that the majority of parents were unemployed. One participant Mr Amarok, stated that some of the parents did not respond at all. Other parents would dispute the fact that they had to re-pay for a textbook not returned by their children. One of the reasons for the lack of parental support was that at the beginning of the year parents were not informed about the textbooks issued to their children. Parents were only informed if their children did not return the textbooks at the end of the year. Mr Amarok, the principal shared this:

*We have noticed that writing letters to parents at the end of the year has not been working for us since parents will come up with explanations such as, we did not know ... So for that reason they cannot be held accountable for the lost textbooks. Hence, some parents do not respond at all.*

Mr Tiguan, the HOD, also added:

*The majority of the parents of our learners are not working. They cannot afford to pay for textbooks.*

Mrs Jetta, the HOD, believed that the culture of non-payment was another cause for this challenge resulting in some parents not responding at all to the letters issued. Since, parents were not required to pay school fees, it seemed difficult for them to believe that they had to

pay for textbooks. Mrs Jetta shared her view that the majority of parents expected the government to buy the textbooks. She said:

*Parents especially of this socio-economic status which is humble [poor], they see themselves being entitled to be given everything by the government.*

Mr Fortuner further indicated that there were gaps in the Department of Education LTSM retrieval policy. He highlighted the policy provision which advised the schools to involve parents should learners fail to return issued textbooks. He mentioned that the majority of parents were not interested in the education of their children and some learners did not have parents or guardians to be contacted for this purpose. As a result, it was a challenge for the school to enforce re-payment plan to learners who could not return textbooks at the end of the year. Mr Fortuner said:

*We seldom find it easy to find participation from the parents. Implementation of this [LTSM] policy like the one we spoke about is not up to a tee. The retrieval policy of the Department has grey areas. It is silent about the learners who do not have parents and about parents who demonstrate no interest in the education of their learners, when the textbooks are not returned.*

Similar to Section 20, in the Section 21 school parents were involved in the accountability for the textbooks issued to their children. Both Toyota and Volkswagen Secondary Schools informed the parents when the learners did not return the textbooks to school. Parents from both schools were informed at the end of the year about the textbooks not returned by their learners. It was interesting to note that the participants from the Section 20 school thought that the timing of the issuing of letters to parents contributed to the challenges encountered in the management of textbooks at their school.

The SGB is required to take appropriate steps to prevent wasteful expenditure and losses in their schools (Mestry & Bodalina, 2015). The SGB is composed of parents and they are in the majority. I believe that the SGB has the responsibility to advise other parents about the importance of their role in being accountable for textbooks issued to their children. Mestry and Bodalina (2015) further state that through effective control, the SGBs are most likely to improve the retrieval rate of resources and minimize the shortages. I also believe that the schools need to inform parents about the textbooks issued to their children at the beginning of the year rather than at the end of the year. Parents need to sign the indemnity form

acknowledging the textbooks received by their children at the beginning of the year. This is in line with the LTSM retrieval policy of the Department of Education (2010) which clearly states that parents are liable for replacing unreturned LTSM as per signed obligatory agreement between the school and the parents. Thus, the SMTs and SGBs have the responsibility to make parents understand their role in the accountability for textbooks.

#### **4.3.3 High rate of defaulters**

The participants from the Section 20 school indicated that there was a high rate of learners who did not return the textbooks, hence the term defaulters. They cited different reasons for such a scenario including that there were learners who did not return the textbooks because they dropped out of school and could not be traced. There were also revelations about learners who did not return textbooks due to the mistakes made by the teachers. Some teachers were committed to the effective management of textbooks while some were not. The majority of participants stated that there was nothing much that the schools could do if learners did not replace the textbooks lost. No penalty or disciplinary measures could be taken against learners who did not return the textbooks. Therefore, learners would lose textbooks or fail to return them without having to face consequences for such actions.

Mr Fortuner, the principal, said:

*We have a high rate of defaulters of textbooks. Over the years we have again failed to address this one. The arrangement was that at the end of the year, we do not give them progress reports until they return the books. The school has been using that as a way of intimidating the learners ... until I got a call from the district office saying we should not be making such a mistake. We should release the progress reports to the learners who have not returned the textbooks and deal with their parents.*

Mr Fortuner went on saying:

*If the learners drop out of school, we do not have means to get the books back. Our hands are tied when it comes to the retrieval policy. Learners will lose textbooks knowing that there will not be any implications for them for not returning the textbooks.*

Mrs Hilux of Toyota Secondary School, shares a similar view to that of Mr Fortuner when she said:

*In my department, before learners get into the examination room they must return the textbooks for that particular subject to be written. I used to scare them that if they do not return my books they will not write the exams. In a way that helps us in our department. Our learners are now trained to return the books before they write. But we do have learners who lose textbooks. We do not deprive them of the chance to write.*

It was interesting to note that within the same school, Toyota Secondary School they did not implement the same measures when dealing with textbook retrieval from learners. The principal indicated that their hands were tied. There was nothing the school could do. However, one of the HODs, Mrs Hilux, stated that she used scare tactics with learners who did not return textbooks by telling them that they were not going to write the final examinations. This HOD indicated that this tactic somehow worked for his department.

In the Section 21 school, Volkswagen Secondary, the majority of participants stated that there was a high rate of learners who did not return textbooks at the end of the year. The principal, Mr Amarok, indicated that as a school there was nothing they could do to learners who ended up not returning the textbooks. One of the reasons for the high rate of defaulters was that some teachers were very negligent.

The principal of Volkswagen Secondary School, Mr Amarok, had this to say about the rate of defaulters in his school:

*There is a high rate of learners who do not return the textbooks. Nothing is done to those learners, because in the past we used to withhold the progress reports. The Education Department came down hard on us, since that right was taken away from us; it became difficult to deal with learners who are not returning the textbooks. We normally motivate and encourage them to see the importance of returning the textbooks.*

Mr Tiguan, the HOD, also added:

*There is a high rate of learners who do not return textbooks. The other cause of that is that some of the teachers are not strict in terms of managing*

*textbooks. Some of us [teachers] are very negligent. Teachers lose retrieval lists and there is no evidence of the learners who received textbooks.*

Both Section 20 and 21 schools had a high rate of textbooks defaulters. There were teachers who were strictly committed and those who were negligent when managing the textbooks in both Toyota and Volkswagen Secondary School. All participants from both schools stated that there was nothing much the schools could do if learners did not replace the textbooks lost. Section 20 school used scare tactics to encourage their learners to return textbooks. For example, the learners who did not return textbooks were not going to write the final examinations while, in the Section 21 school they would indicate that if the learner has lost the textbook, the school would not issue the progress report to him / her at the end of the year. Both schools did not yield great improvement from using these scare tactics.

Based on the data presented above, it shows that there was a high rate of learners who did not return the textbooks at the end of the year. According to Mestry and Bodalina (2015) the serious concern facing Provincial Education Departments (PEDs) and SGBs of public schools is the low textbook retrieval rates. It was stated that there were learners who ended up not returning the textbooks to schools at all. The responses from the majority of participants clearly stated that there were no measures taken against those learners who were defaulters. According to the LTSM policy, in the event the textbook is lost or destroyed while in the care of a learner, as an act of negligence, penalty measures must be implemented (Department of Education, 2010). However, there are clearly stipulated penalty measures to be implemented by the schools to encourage learners or parents to return the textbooks. Hence, schools and teachers had different methods of dealing with the learners who did not return the textbooks. This implied that the methods sanctioned by the LTSM Retrieval policy of the Department of Education were not effective in assisting the schools to retrieve more textbooks.

#### **4.3.4 Storage of textbooks**

The majority of participants from the Section 20 school, Toyota Secondary School, indicated that there was a challenge with regard to the storage of textbooks in their schools. The principal, Mr Fortuner, indicated that they did not have enough space to safely keep and store the textbooks. At Toyota Secondary School, textbooks were kept in the strong rooms which were reported to be full of textbooks and other educational equipment.

This is what Mr Fortuner, the principal said:

*We normally receive a lot of boxes of textbooks. We do not have enough space. This is regardless of the fact that we have two strong rooms. We also use our strong rooms to keep other equipment we have in our school.*

Mrs Hilux of Toyota Secondary School shared the same view as her principal that they did not have enough space to keep the textbooks safe. She further explained that this made it hard for them to ascertain the stock available at any point in time. It was therefore difficult for the HODs to manage the textbooks due to the fact that textbooks were scattered in different staffrooms and offices due to lack of storage facilities.

Mrs Hilux stated:

*Our strong room is very small; therefore, we cannot keep all books inside. We sometimes check the textbooks and ask teachers to keep the books at their staffroom and some in our offices due to the small size of our strong room. We end up not sure of the textbooks available because the books are all over the school.*

Data from Volkswagen Secondary School, a Section 21 school, confirmed that there was a challenge with regard to the storage of textbooks. Volkswagen Secondary School had 980 learners enrolled in this school. As a result, they received a number of boxes of textbooks. Consequently, the strong room could not keep all the textbooks as it was small.

The principal, Mr Amarok, said:

*We have a challenge with the storage of textbooks. When we get the textbooks we make sure that we distribute them to the learners. The problem begins at the end of the year when we have to retrieve and store them. We have 980 learners and that leaves us with a lot of books which we do not have space for.*

He further added:

*Ideally the stock is supposed to be counted at the end of the year when the retrieval process has been done. But it does not happen that way you will find that the teachers will retrieve the books and then keep them to themselves until the beginning of the following year. In fact, it was going to be better if we had a big strong room that could accommodate all the textbooks.*

The participants' responses suggest that there was a shortage of storage for textbooks in both Section 20 and 21 schools. Toyota and Volkswagen Secondary School had strong rooms where they kept the textbooks. However, due to limited space these strong rooms could not accommodate all textbooks. Consequently, some textbooks were not kept safe in both section 20 and 21 schools.

According to the LTSM Retrieval Policy of the KZN Department of Education (2013) the textbooks should be kept separately, preferably in the store room or lockable cupboard and be properly organised for easy access and utilization. The LTSM Retrieval policy which states that stocktaking must be done annually in order to facilitate the removal of resources that are unused, outdated, damaged and no longer appropriate. Bakwai (2013) assert that the quality and duration of educational resources basically is affected by the way they are looked after, and the way in which they are serviced and repaired in their life span.

#### **4.3.5 Shortage of textbooks**

It emerged that there was a shortage of textbooks in the Section 20 school. The majority of participants from Toyota Secondary School stated that the textbooks were not enough for all learners. One of the causes mentioned was the improper handling of textbooks by the learners. It was also stated that the majority of learners were not oriented on how to properly handle the textbooks issued to them. When some learners returned textbooks it was no longer in good condition and unusable by learners in the following year. Some textbooks pages were destroyed and some were torn or missing. Frequent change of the curriculum was also mentioned as the cause of the shortage of textbooks in schools, since schools needed to purchase new textbooks. Mr Fortuner admitted failure when he said:

*Another challenge is that some of the textbooks do get back to us but in a bad state. As a school we have failed in addressing this problem. We have been focusing on whether the book has been returned but not looking at its condition.*

At Volkswagen Secondary School, a Section 21 school, participants' voices revealed that there was a shortage of textbooks. Mr Tiguan explained that they issued the textbooks in good condition however, some learners returned them in an unusable condition. Such damaged textbooks could not be issued to learners in the following year.

Mr Tiguan explained:

*At the beginning of the year we issue textbooks to learners at their good condition. When you collect the textbooks at the end of the year, you wonder if it is still the same books you issued. The way the book was handled. Textbooks cover page is no longer there, some pages are missing. The book is not in a good condition to be used by other learners in the following year.*

Another cause of the shortage of textbooks identified at the Section 21 school was the frequent change of the curriculum by the Department of education. The schools had to buy new books instead of adding to available textbooks. Mrs Jetta, the HOD, said:

*I cannot say we have enough textbooks. For example, the repeated change of the curriculum by the department somehow leaves us with a shortage of books. Instead of topping up we start again from zero and buy new books.*

Mrs Jetta further mentioned the issue of the enrolment that increased every year. She said:

*... every year we find ourselves admitting more learners than we intended. This creates lots of problems when issuing textbooks. Textbooks will not be enough for all learners.*

The majority of participants, from both Section 20 and 21 schools, mentioned that they had focused on the retrieval of textbooks but without success. Both Section 20 and 21 schools appeared not to have done enough to encourage learners to take good care of the textbooks. Hence, Toyota and Volkswagen Secondary School had the shortage of textbooks which seems to be made worse by failure of learners to take care of their textbooks. However, it was interesting to note that the school LTSM Retrieval Policy at Toyota Secondary School clearly stated that all textbooks issued to learners must be properly covered in plastic material in order to reduce the rate of physical deteriorations. According to the LTSM policy of the Department of Education (2010), parents must ensure that the loaned textbooks are returned in good condition and on time to the school at the end of the year.

Hasting (2010) asserts that the structures like LTSM committee should incorporate ways of pursuing optimum sustainable performance of physical resources. Textbooks need to be kept in a good condition so that they can be used by the learners over the following years. This is also affirmed by the LTSM policy which states that LTSM committee should implement the procurement policy that guides the acquisition, utilisation and control of physical resources (Department of Education, 2010). According to Mestry and Bodalina (2015, p. 5) “the

provision and utilization of appropriate educational resources is a prerequisite for high learner performance and sound educational outcomes’’. Therefore, there is a need for the LTSM committee to develop and effectively implement a textbook retrieval policy thereby emphasising the significance of taking good care of the LTSM provided to learners and teachers.

The data from both Section 20 and 21 schools confirm that there are numerous challenges in the management of textbooks in these schools. It was mentioned by the majority of participants that the LTSM budget allocation was insufficient. Mohono (2010) observes that the government is the only financial source of LTSM in some public schools which is a challenge. The schools could not afford to purchase the quantities of textbooks required. There was a challenge in the involvement of parents in the management of textbooks. Parents were involved by the schools if the learner did not return the textbook at the end of the year. There was a high rate of textbooks defaulters who did not return the textbooks at all. There was a challenge with storage of textbooks in both schools and it was indicated that they did not have enough space to safely keep and store textbooks. The majority of participants mentioned that there was a shortage of textbooks in both schools. The above challenges largely contributed to the LTSM policy not being fully implemented in schools. According to the LTSM policy, it is imperative for all schools in the province to apply this policy for the sake of effective teaching and learning (Department of Education, 2010).

The above discussion is in line with the Resource-based theory from which the study draws. According to Barney (1991), firm resources include all assets, capabilities, organisational processes, firm attributes, information and knowledge controlled by a firm. Assets are therefore resources that an organisation can utilise to transform itself in an effort to achieve its goals. Since resources are scarce and limited in supply, their management therefore, demands some skills, training, careful planning, supervision and some degree of control in schools. The SMT and teachers should be trained or have some skills on how to manage the limited resources available.

#### **4.4 THE STRATEGIES USED TO ADDRESS THE CHALLENGES ENCOUNTERED**

To address the challenges encountered in the management of textbooks, the SMTs devised a number of strategies. These are the sub-themes that emerged from the data: sharing of textbooks in the Section 20 and 21 schools and quarterly monitoring of textbooks in the section 20 school.

#### 4.4.1 Sharing of textbooks

In the Section 20 and 21 schools, learners were told to share textbooks. The principal, Mr Fortuner, pointed out that it was difficult to monitor the utilisation of textbooks if learners were sharing. Due to such challenges other teachers opted not to issue learners with textbooks but move with textbooks from one class to another.

Mr Corolla of Toyota Secondary school had this to say:

*Not all learners have textbooks, some are sharing. But in Maths and Accounting we make sure that all learners have their own textbooks. It is because learners must daily practise these subjects. In grade 8 and 9 you will find 3 learners sharing one textbook. Our school has a huge enrolment in the GET band. We do not have enough books [for all].*

It was difficult to manage textbooks which were shared by a number of learners. It was also difficult to ensure that all learners utilised or had equitable access to the shared textbooks.

Mr Corolla said:

*It is difficult to manage the utilisation of a book that is shared by more than one learner. I have seen learners coming to school with few exercise books hardly any textbooks. When does this learner take the book and use it at home? No one monitors that. Should learner one for instance disappears with the book in group of three learners sharing. We cannot now make the other two to pay for that textbook.*

Mrs Hilux had this to say:

*Sometimes teachers have to keep the books with them whenever they go to class they carry the textbooks. In that process we lose textbooks.*

Section 21 school participants also declared that some learners were sharing textbooks. Mr Amarok, the principal of Volkswagen Secondary School stated that due to shortage of textbooks, learners were made to share textbooks.

This is what Mr Amarok had to say:

*Textbooks are not enough for all our learners. We find ourselves having to make our learners to share textbooks. There are two or three learners using one book.*

Mrs Jetta, the HOD, concurred with Mr Amarak to say:

*The strategy that we use in our school, learners are sharing textbooks*

In the Section 20 school the majority of participants' responses revealed that some teachers opted not to issue textbooks to learners but kept the textbooks and moved around with them from class to class. Like the Section 20 school, the Section 21 school made their learners to share textbooks due to shortage. One participant, Mrs Hilux from Toyota Secondary School indicated that it was difficult for the teachers to manage and avoid loss of textbooks when they moved with them from class to class. Therefore, it is essential that every learner has a textbook in order to enhance effective teaching and learning.

#### **4.4.2 Quarterly monitoring of textbooks**

Due to high rate of defaulters and shortage of textbooks, the principal of Toyota Secondary School, a Section 20 school, started to manage and monitor textbooks quarterly. It was stated by Mr Fortuner, the principal, that stocktaking of textbooks and checking of available textbooks was done quarterly. He further mentioned that teachers had to check with the learners if they still possessed the textbooks. This was done in order to determine as early as possible if textbooks were lost or not. Mr Fortuner clearly explained that this strategy enabled the school to consult parents in time about the textbooks issued to their children. He further revealed that he believed that this strategy was helping both teachers and learners to manage the textbooks effectively. Mrs Hilux stated that the school was able to retrieve more textbooks after they started to implement this strategy. However, Mr Corolla indicated that this strategy was not uniformly implemented by all the teachers. Some teachers perceived this strategy to be an additional job to their already heavy workload.

Mr Fortuner said:

*The quarterly monitoring has helped a lot. We have been able to retrieve more textbooks since we have intensified our quarterly monitoring of textbooks. Teachers go to their learners and check if textbooks are still available. The teachers will have to see the actual textbook. The teacher will*

*therefore report to the HOD. The HOD will forward the statistics to the Deputy Principal, those figures will assist the deputy principal and school administration clerk when conducting stocktaking.*

Mrs Hilux also confirmed that this strategy of quarterly monitoring had helped them to retrieve more textbooks. She also stated that this strategy enabled the school to inform parents about the textbooks loaned to their children throughout the year. This is how she expressed her view:

*Since we have started to closely monitor the textbooks quarterly, the learners are more responsible and parents are fully involved in the management of the textbooks. The majority of parents are now very supportive and less textbooks which are not returned.*

Mr Corolla was very pessimistic about the strategy of quarterly monitoring by teachers. His argument was that the school could not do anything to a learner who had lost the textbooks even if it was discovered early in the year. He upheld the view that the schools had been disarmed by the Department of Education in effectively managing the textbooks in schools. This is what Mr Corolla had to say:

*Our principal intended that we do stocktaking quarterly in order that we will know as soon as the book is lost. So that we inform the parents in time. Because of many excuses from teacher this is not done properly. Teachers are seeing this as adding more work for them. We can introduce many strategies but it must start with our attitude as teachers.*

He further added:

*I think it discourages most teachers that there is nothing done if a learner does not pay for the textbook lost.*

However, it was not stated during the interviews if Volkswagen Secondary School, Section 21, was also using this strategy of quarterly monitoring of textbooks. The general feeling among the majority of participants, at the Toyota Secondary School was that these strategies were helping them to retrieve more textbooks at the end of the year. The majority of participants held the view that frequent monitoring had made learners, teachers and parents to actively participate in the management of textbooks in schools. According to the LTSM

Policy of the Department of Education (2010) stocktaking must be done quarterly. There were teachers who were not responsible or vigilant enough in their management of textbooks. It was clear that there was an improvement in the management of textbooks in the Section 20 school.

The above discussion is in line with the Resource-based theory from which the study draws. The Resource Based views contend that the resources can answer the question, how firms achieved and sustain advantages (Fahy, 2000). This means that an organisation is resourceful when it is able to sufficiently acquire and reasonably distribute the scarce resources. The schools should procure textbooks and reasonably distribute to all learners in all grade for all subjects.

#### **4.5 CHAPTER SUMMARY**

This chapter focused on the presentation of data and discussion of the findings from the data generated through the interviews. Semi-structured interviews were used with the school principals and HODs. These findings were then presented using themes and sub-themes that emerged from the data generated; the role of the SMT in the management of textbooks, the challenges faced by the SMT in the management of textbooks and the strategies used to address the challenges encountered.

In the following chapter, the summary of the study, conclusions and recommendations will be dealt with.

## CHAPTER 5

### SUMMARY OF THE STUDY, CONCLUSIONS AND RECOMMENDATIONS

#### 5.1 INTRODUCTION

Chapter four dealt with the presentation of data and analysis of the findings. I commence this chapter by presenting a summary of the study. Thereafter, I present the conclusions of the study, followed by the recommendations based on the findings and conclusions drawn.

#### 5.2 SUMMARY OF THE STUDY

This study was divided into five chapters

In Chapter One I introduced the study. I presented the background and rationale of the study. I explained the reasons why this piece of research had to be done. The motivation for the study emanates from the literature, where I discovered that the available literature tends to focus on management of financial and human resources and not much on learning and teaching support materials (LTSMs). I have also discovered that managing learning and teaching support materials is one of the major tasks of every school principal and teachers. I therefore found it worth examining the role of the SMT in the management of the LTSM by comparing Section 20 and 21 public schools. I explained how the *South African Schools Act, 84 of 1996* (SASA) creates categories of public schools; Section 20 and Section 21 schools. The SASA stipulates that public schools are mandated to manage state funds allocated to them in terms of Sections 20 and 21 of the Act.

Furthermore, the Act stipulates that the school allocation may cover the LTSMs and Non-LTSMs. I explained that according to the *Norms and Standards for School Funding*, all public schools are funded on the basis of need using the Resource Targeting Table. I then, presented how the Department of Education prescribes that the LTSM budget allocation should be spent by public schools. I also highlighted the procedure for the procurement of textbooks for both Sections 20 and 21 schools. I also explained the aim of the study which was to explore the role of the SMT in the management of textbooks in both Sections 20 and 21 schools. Additionally, I provided the three key critical questions that informed this study namely;

- What is the role of the SMT in the management of textbooks in Section 20 and 21 schools?

- What are the challenges faced by the SMT in the management of textbooks in Section 20 and 21 schools and why?
- How are the challenges encountered by the SMT addressed in Section 20 and 21 schools?

Finally, I explained the terms pertinent to the study namely; management, learning and teaching support materials so as to ensure a common understanding of the terms. I then briefly outlined the organisation of the study and summarised the chapter.

In chapter Two I presented the related literature reviewed; the literature that covers several aspects of the management of the LTSM related to my key research questions. I began by reviewing the policy landscape on LTSM in South Africa in general and the KwaZulu-Natal province in particular. I then discussed the management of LTSM in schools. This was followed by the challenges in the management of LTSM in schools. I next explored LTSM's influence on learner performance. I then presented the two theoretical frameworks that underpinned the study which are Strategic management theory, as an overarching theory and Resource-based theory. I illustrated how these theories provided a framework and related to the management of LTSM in schools.

In Chapter Three I outlined the research design and methodology that was employed in the study. This study used a qualitative approach. It is located within the interpretivist paradigm and it adopted a case study research design. This study generated data through semi-structured interviews and document review. The semi-structured interviews were conducted with the two secondary schools; Sections 20 and 21 schools. Documents reviewed were the schools' LTSM policies, and textbooks retrieval lists. Participants were the school principals and the HODs from the selected secondary schools. I explained that I selected the participant schools using purposive sampling and participants were conveniently sampled. I also explained how I gained access to the research sites. I wrote letters to the gate keepers asking for permission to conduct the study. Participants signed consent letters which informed the participants of their right to privacy and that the information that they provided will be treated confidentially and used only for the study. To enhance trustworthiness in this qualitative research the following four issues were taken into consideration: credibility, transferability, dependability and confirmability. Lastly, the limitations of the study were presented.

Chapter Four presented the findings and discussion of the findings. The findings were discussed and separated into different themes and sub-themes that emerged from the data. The first theme emerging from the data was the role of the SMT in the management of textbooks in schools. The sub-themes were namely; the development of LTSM policy, composition of LTSM committee and the planning, distribution and retrieval of textbooks. The key findings revealed that the SMT managed the procurement of textbooks in schools. The SMT developed the school's LTSM policy in consultation with the teachers in the Section 20 school unlike in the Section 21 school, where the LTSM policy was developed solely by the SMT. The study revealed that the LTSM committee was composed of the SMT members only in both schools. However, this was not in line with the prescriptions of the LTSM policy of the Department of Education. Other relevant stakeholders were excluded in the composition of the LTSM committee. Furthermore, the study also revealed that the LTSM committee facilitated the planning process of the procurement of textbooks in schools. It was the role of the SMT to administer and monitor the distribution and retrieval of textbooks.

The second theme that emanated from the data was the challenges faced by the SMT in the management of textbooks. The sub-themes that emerged were inadequate LTSM budget allocation, parental involvement, high rate of defaulters, storage of textbooks and shortage of textbooks. The study revealed that the LTSM budget allocation was insufficient to procure the required quantity of textbooks in the Section 20 and 21 schools. It was also revealed that parents were not fully involved in the process of managing the textbooks in both schools. Parents were issued letters to inform them if the learner failed to return the textbooks at the end of the year. There were teachers who contributed to the high rate of textbooks defaulters from both Section 20 and 21 school. Some teachers contributed to the high rate of textbooks defaulters by losing the retrieval lists and some were not vigilant enough in their management of textbooks. Hence, there were learners who failed to return the textbooks at the end of the year. It was also revealed that both schools had a challenge with the storage of textbooks. Strong rooms were not adequate to store all textbooks in both Sections 20 and 21 schools, therefore, textbooks were lying around the staffrooms and the HOD's offices. It was also revealed by the study that there was a shortage of textbooks. Some learners returned textbooks but not in good condition to be utilised the following year. The Section 20 and 21 schools indicated that their hands were tied since the Department of Education provided the guidelines on how to deal with learners who did not return the textbooks, unfortunately the

guidelines provided by the Department of Education are ineffective to address the problem. The last theme presented the strategies used to address challenges encountered by the SMT in both schools. The sub-themes that emerged from the data generated were; learners sharing textbooks from Section 20 and 21 schools and quarterly monitoring of textbooks from Section 20 school. The findings of this study revealed that the strategy that was used by the Section 20 and 21 schools were to make learners to share textbooks. Two to three learners were made to share a textbook because of the shortage of textbooks. It was indicated that this posed challenges for both schools in the management of textbooks whereby the textbook is lost. It was challenging because not all learners will own up when they have lost textbooks. The schools were not able to cause all three learners to pay for the textbook. It also posed challenges for SMT and teachers to ensure and monitor the utilisation of the textbooks by all learners for both Sections 20 and 21.

The study also revealed that the Section 20 school, unlike the Section 21 school, had started to monitor the textbooks on quarterly basis. It was indicated that subject teachers checked textbooks quarterly to ensure that learners still had the textbooks. Parents were informed about the textbooks issued to their children throughout the year. This strategy had challenges, whereby not all teachers were vigilant and responsible to monitor textbooks quarterly. It was also revealed that some teachers felt that this was adding to their work-load. Having followed this process the following conclusions can be reached.

### **5.3 CONCLUSIONS**

This study aimed at exploring the role of the SMT in the management of textbooks in schools. Based on the findings made, some clear conclusions can be drawn. Conclusions are presented around each research question.

#### **5.3.1 THE ROLE OF THE SMT IN THE MANAGEMENT OF TEXTBOOKS IN SCHOOLS**

It is important for the school to develop a school LTSM policy in order to manage textbooks effectively. The composition of the LTSM committee was not in line with the guidelines of the Department of Education from both Sections 20 and 21 schools. All stakeholders needed to be included in the composition of LTSM committee. For example, senior teachers, phase co-ordinators, educator representative in the SGB and teacher-librarian. The failure of SGB to

execute this function can lead to a situation where the principal or SMT taking full responsibility for managing the LTSM and the SGB just approving the budget for the procurement of these resources. It is also important that all stakeholders in the school context are represented in this committee for fairness. It is the role of the SMT to manage the planning, distribution and retrieval of textbooks in both Section 20 and 21 schools.

### **5.3.2 THE CHALLENGES FACED BY THE SMT IN THE MANAGEMENT OF TEXTBOOKS**

Drawing from the findings, there are challenges faced by the SMT in the management of textbooks in both Section 20 and 21 schools. There was a challenge around the LTSM budget allocation which seemed to be insufficient in Section 20 and 21 schools. The quantities of textbooks purchased were not enough to cater for all the learners from schools. In the Sections 20 and 21 school, parents were involved in the management of textbooks when a learner did not return the textbooks at the end of the year. It was clear that there was a shortage of textbooks in both Section 20 and 21 schools. There is a positive relationship that exists between the availability of educational resources and learners' academic performance (Vandiver, 2011). The schools with limited LTSMs, for example textbooks, may not achieve good learner academic performance.

### **5.3.3 THE STRATEGIES USED TO ADDRESS THE CHALLENGES ENCOUNTERED BY THE SMT**

Learners were made to share textbooks in the Section 20 and 21 schools. This caused the SMT and the teachers to be unable to manage the utilisation of textbooks by all learners. At the same time the Section 20 school had just started to use the quarterly monitoring of textbooks strategy in order to manage textbooks. This strategy assisted the school to inform the parents about the textbooks loaned to their children throughout the year. Parents were then able to support the school in the management of the textbooks loaned to their children. The school was beginning to increase the rate of textbooks retrieved from learners. Given these conclusions I am therefore making the following recommendations.

### **5.4 RECOMMENDATIONS**

On the basis of the above conclusions I recommend that:

#### **5.4.1 RECOMMENDATION ONE**

The Department of Education needs to ensure that the SGBs are fully capacitated about their roles and responsibilities to appoint a LTSM committee. The SGB should be responsible for the composition of the LTSM committee and ensure that all stakeholders are represented according to the LTSM policy of the Department of Education.

#### **5.4.2 RECOMMENDATION TWO**

The SMTs needs to monitor the work of the LTSM committee in the implementation of the LTSM policy in schools. The SMT must ensure that there is regular monitoring of textbooks retrieval. The LTSM committee must be accountable to the SMT and the Department of Education regarding how LTSMs are managed in schools.

#### **5.4.3 RECOMMENDATION THREE**

The school principals need to work collaboratively with the SGBs to generate funds from other financial sources in order supplement the school allocation and increase the LTSM budget for textbooks.

#### **5.4.4 RECOMMENDATION FOUR**

The schools need to invest in textbooks by issuing plastic covers to all learners to ensure that all textbooks are covered. The schools need to educate learners about the importance of proper handling of the textbooks in order to alleviate the shortage of textbooks. This can help the school to maintain the available textbooks in good condition in order to be utilised in the following year.

### **5.5 CHAPTER SUMMARY**

This chapter has provided a summary of the study and presented the conclusions. Based on the conclusions drawn, recommendations were made which may assist the Department of Education and the SMTs in improving the way in which textbooks are managed in schools.

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**APPENDIX A**

**LETTER TO THE SCHOOL PRINCIPAL**

No. 5 Sauer Place

Ashley

PINETOWN

3610

13 December 2014

The Principal

Dear Sir/ Madam

**RE: REQUEST FOR PERMISSION TO CONDUCT RESEARCH AT YOUR SCHOOL**

I, Mrs E.N. Phakathi (student no. 212558678), request permission to conduct research at your school. I am currently enrolled for Master in Education degree at the University of KwaZulu-Natal. I therefore kindly seek permission from you to conduct research in your school. My topic is: The management of Learning and Teaching Support Materials in public schools: A comparative study. I request permission to interview you as the leader of the school and two HODs as they are policy implementers. Interviews will be audio-recorded. The interview questions will be semi-structured to allow some flexibility and the entire interview process will occur once for the duration of approximately 45 minutes.

It is an academic study of which teachers and the Ministry of Education may benefit as it is likely to help the School Management Team to understand how to manage teaching and learning resources successfully and address challenges encountered. The HODs may also gain an understanding of the strategies to apply and help other schools on how to manage resources. The research targets the school principals and the HODs. They will be interviewed as individuals.

**PLEASE TAKE NOTE THAT:**

There will be no financial benefits that participants may accrue as a result of their participation in this research project. Participants' identities will not be revealed under any

circumstances, during and after the reporting process. All responses will be treated with strict confidentiality. Fictitious names will be used to represent participants' names. Participation is voluntary which means participants are free to withdraw at any time they so wish without incurring any negative or undesirable consequences on their part. The interviews shall be voice-recorded to assist me in concentrating on actual interview.

If you have any concerns about the study, please contact my supervisor or the research office whose contact details are provided below. I hope that you will consider my request favourably and grant me written consent to conduct my study at your school.

Supervisor's details:

Dr Inba Naicker

Faculty of Education

University of KwaZulu-Natal

School of Education

Edgewood campus Tel. 031 260 3461

E-mail: [Naicker1@ukzn.ac.za](mailto:Naicker1@ukzn.ac.za)

Thank you in advance for your time and consideration.

Yours faithfully

.....  
Mrs E.N. Phakathi

Tel. No. 031 700 2389

Cell. No. 076 1024 005

## APPENDIX B

### (INFORMED CONSENT BY PARTICIPANTS) School Principals

No. 5 Sauer Place

Ashley

PINETOWN

3610

13 December 2014

The Principal

..... High school

Dear Principal

#### RE: A REQUEST FOR YOUR PARTICIPATION

I, Mrs E.N. Phakathi conducting a research project title: **The management of Learning and Teaching Support Materials in public schools: A comparative study**, request you to participate in the study during data generation that will take place at your school. I request permission to interview you as the principal. The interview will take place at your school for at least 45 minutes.

Further clarifications:

- This study may help you and other school principals.
- All the responses will be treated with strict confidentiality.
- Fictitious names will be used to represent participant's names (real names of participants and school will not be used throughout the research process).
- Participation is voluntary; therefore you are free to withdraw any time without any negative or undesirable consequences to you.
- Audio recording will be done through your permission.
- Data will be stored in my locked up cupboard for a maximum period of five years thereafter it will be destroyed through burning.
- There will be no financial benefits that participants may accrue as a results of their participation in this research project.

**DECLARATION FORM**

I ..... (Full names of the participant) hereby confirm that I have read and understood the nature, purpose and procedures for the study: **The management of Learning and Teaching Support Materials in public schools: A comparative study.**

I understand everything that has been explained to me and I consent voluntarily to take part in the study. I understand that I am at liberty to withdraw from the project at any time, should I so desire.

**SIGNATURE**

**DATE**

.....

.....

I thank you in advance

Yours faithfully

.....

Phakathi E.N.

APPENDIX C

(INFORMED CONSENT BY PARTICIPANTS) HODs

No. 5 Sauer Place

Ashley

PINETOWN

3610

13 December 2014

The HOD

..... High school

Dear Principal

**RE: A REQUEST FOR YOUR PARTICIPATION**

I, Mrs E.N. Phakathi conducting a research project title: **The management of Learning and Teaching Support Materials in public schools: A comparative study**, request you to participate in the study during data generation that will take place at your school. I request permission to interview you as the HOD. The interview will take place at your school for at least 45 minutes.

Further clarifications:

- This study may help you and other HODs.
- All the responses will be treated with strict confidentiality.
- Fictitious names will be used to represent participant's names (real names of participants and school will not be used throughout the research process.
- Participation is voluntary; therefore you are free to withdraw any time without any negative or undesirable consequences to you.
- Audio recording will be done through your permission.
- Data will be stored in my locked up cupboard for a maximum period of five years thereafter it will be destroyed through burning.
- There will be no financial benefits that participants may accrue as a results of their participation in this research project.

**DECLARATION FORM**

I ..... (Full names of the participant) hereby confirm that I have read and understood the nature, purpose and procedures for the study: **The management of Learning and Teaching Support Materials in public schools: A comparative study.**

I understand everything that has been explained to me and I consent voluntarily to take part in the study. I understand that I am at liberty to withdraw from the project at any time, should I so desire.

**SIGNATURE**

**DATE**

.....

.....

I thank you in advance

Yours faithfully

.....

Phakathi E.N.

## APPENDIX D

### INTERVIEW SCHEDULE

#### 1. **Role of the SMT in the management of textbooks.**

1.1 Does your school have a LTSM policy that covers textbooks. How was the policy developed? Do you think that this policy is effective in managing textbooks?

1.2 What is your leadership role in the management of textbooks in your school?

Probes :

##### **Planning**

1. Which textbooks to buy? Why?
2. Who makes the decision?
3. How is the decision made?

##### **Procurement**

1. Is there a LTSM committee in your school? Who are the members of this committee?
2. How is procurement done in your school?

##### **Receiving and processing**

1. Who receives textbooks?
2. How are they recorded or put onto the stock register?

##### **Distribution**

1. How are textbooks allocated or distributed within the school?
2. Who is responsible for distribution of textbooks in your school?
3. How are records kept of the distribution?

##### **Retrieval of textbooks**

1. Do you have a LTSM retrieval policy in your school?
2. How is the retrieval of textbooks done in your school?
3. What happens to defaulters?

**2. Challenges faced by SMT in the management of textbooks?**

2.1 What challenges do you encounter as the Principal/ HOD in the management of textbooks in your school?

2.2 What do you think are the causes of these challenges?

Probes:

1. What are the challenges in the distribution process of textbooks?
2. What are the challenges in the retrieval process of textbooks?
3. Do you have sufficient textbooks for all your learners?

**3. How the SMT addresses challenges encountered.**

3.1 How do you address the challenges you are facing with regarding the management of textbooks in this school?

3.2 How successful have your attempts been?

Probes:

1. Which method do you use to check if all learners have received textbooks at the beginning of the year?
2. Which strategy do you apply to monitor on the retrieval at the end of the year?

## **APPENDIX E**

### **DOCUMENTS REVIEW**

1. LTSM policy
2. Textbooks retrieval lists
3. Minutes of LTSM committee

**APPENDIX F**

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CHAPTER 1 ORIENTATION TO THE STUDY 1.1 INTRODUCTION This study explores the management

## APPENDIX G



education

Department:  
Education  
**PROVINCE OF KWAZULU-NATAL**

Dr. Les Ntshongal Ngweni

Tel: 033 362 1004

Ref: 248/355

Ms EN Phakathi  
125 Bauer Place  
-67th  
NETOWN  
3310

Dear Ms Phakathi

### PERMISSION TO CONDUCT RESEARCH IN THE KZN DoE INSTITUTIONS

Your application to conduct research entitled: **"THE MANAGEMENT OF LEARNING AND TEACHING SUPPORT MATERIALS AT PUBLIC SCHOOLS: A COMPARATIVE STUDY OF TWO SCHOOL CATEGORIES"**, in the KwaZulu-Natal Department of Education institutions has been approved. The conditions of the approval are as follows:

1. The researcher will make all the arrangements concerning the research and interviews.
2. The researcher must ensure that Educator and learning programmes are not interrupted.
3. Interviews are not conducted during the time of writing examinations in schools.
4. Learners, Educators, Schools and Institutions are not identifiable in any way from the results of the research.
5. A copy of this letter is submitted to District Managers, Principals and Heads of Institutions where the intended research and interviews are to be conducted.
6. The period of investigation is limited to the period from 01 March 2015 to 31 March 2016.
7. Your research and interviews will be limited to the schools you have proposed and approved by the Head of Department. Please note that Principals, Educators, Departmental Officials and Learners are under no obligation to participate or assist you in your investigation.
8. Should you wish to extend the period of your survey at the school(s), please contact Miss Connie Kehlogile at the contact numbers below.
9. Upon completion of the research, a brief summary of the findings, recommendations or a full report / dissertation / thesis must be submitted to the research office of the Department. Please address it to The Office of the HOD, Private Bag X8137, Pietermaritzburg, 3200.
10. Please note that your research and interviews will be limited to schools and institutions in KwaZulu-Natal Department of Education.

Hlahlindlela High School  
KwaDinabakubo Secondary School

Nikosinathi S.P. Sishi, PhD  
Head of Department: Education  
Date: 25 February 2015

#### KWAZULU-NATAL DEPARTMENT OF EDUCATION

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## Dr Saths Govender

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22 DECEMBER 2015

TO WHOM IT MAY CONCERN

### LANGUAGE CLEARANCE CERTIFICATE

This serves to inform that I have read the final version of the dissertation titled:

**THE MANAGEMENT OF LEARNING AND TEACHING SUPPORT MATERIALS  
IN PUBLIC SCHOOLS: A COMPARATIVE STUDY** by E.N. Phakathi.

To the best of my knowledge, all the proposed amendments have been effected and the work is free of spelling and grammatical errors. I am of the view that the quality of language used meets generally accepted academic standards.

Yours faithfully



**DR S. GOVENDER**  
B Paed. (Arts), B.A. (Hons), B Ed.  
Cambridge Certificate for English Medium Teachers  
MPA, D Admin.