

**An Investigation of the Changing Roles and
Responsibilities of Educators in Middle
Management in the Context of Education
Reform in Secondary Schools**

By

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**A dissertation submitted in partial fulfilment of the requirements
for the degree of Master of Education**

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DECLARATION

I declare that this research study, *An Investigation of the Changing Roles and Responsibilities of Educators In Middle Management in the Context of Education Reform in Secondary Schools*, represents my original work, carried out under the supervision of Ms Saadjidha Sader and Dr Whitfield Green. It is submitted in partial fulfilment of the requirements for the degree of Master of Education, in the Faculty of Education at the University of KwaZulu-Natal, Pietermaritzburg. Where use has been made of the work of others it is duly acknowledged in the text.

Ellah Hendriatta Ziningi Hina
2009

ABSTRACT

Since 1994, South African education has experienced major educational reforms that have resulted in a shift in the management and administration of schools. These educational reforms have had remarkable impact on the management of schools. The purpose of the current study was to investigate the perceptions of Head of Departments – (HODs) on the effects of educational reforms linked to globalisation on the professional lives and work of educators serving in the middle management positions at secondary schools. The study focused on the effects of educational reforms on the roles and responsibilities of educators serving in middle management positions in secondary schools in Pietermaritzburg.

It was located within the critical paradigm, which aims at interrogating power relations and underlying forces that shape the dynamics of educational institutions in South Africa. It drew on contrasting views of social justice to analyse the educator's experience. The neo-liberal construct of social justice and critical construction of social justice were used. The study was an exploratory case study that used focus group interviews and semi-structured in-depth interview methods as qualitative methods of data collection. Thematic analysis has been used to analyse data that has been collected. The globalisation theories and themes were used as lenses for data interpretation.

Eight secondary schools middle managers (HODs) managing Mathematics and Physical Science from schools in Pietermaritzburg District participated in the study. Schools selected represented the racial, social, gender, economic and linguistic diversity of the province.

The findings suggested that the effects of education policies influenced by neo-liberal globalisation have redefined the roles and responsibilities in ways that minimize the HODs autonomy and lead to the deskilling of educators who have been trained to perform their duties successfully and efficiently. The new education policies have coerced the educators including HODs to become 'skills technicians' degrading them as

autonomous professionals. The neo-liberal policies exploited the HODs by coercing them to do both administrative work whilst being responsible for curriculum leadership. The HODs experienced dialectical tensions between allegiances to the subject (curriculum leadership) versus administrative role.

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CHAPTER 1

SETTING THE SCENE

1.1 Introduction

The main objective of the current study is to explore the effect of educational reforms and its impact on the professional lives and work of educators in middle management positions in schools. This chapter provides the scope and context of my study. I will introduce this chapter by contextualizing my study through motivating, or providing the rationale for, the study. I will do that by briefly presenting international studies conducted on the impact of educational reforms associated with globalisation and its impact on educators and then look at studies conducted nationally.

1.2 The Research Focus

This study explored the effect of globalisation as it is manifest in education reforms by focusing on the professional lives and work of middle managers in schools, in particular, Heads of Departments (HODs) in secondary schools. The study explored the experiences of HODs in relation to curriculum reforms, classroom practice, assessment and relationships. I have explored how the HODs have perceived educational reforms and their impact on the professional lives and work of the HODs. In this study I have used the terms HODs and middle managers as interchangeable. The terms middle managers and middle management in this study refer to HODs. The term ‘middle management’ is a new term that has been introduced by educational changes that positions the HODs in the line management in schools. The HODs in the school setting both manage and are managed. I often use ‘HODs’ as a term that is familiar to most educators and I have tried to minimise the usage of ‘middle management’ and ‘middle managers’.

1.3 Research Question

The key research question was:

How have education reforms affected the professional lives and work of educators in middle management positions, namely Heads of Departments (HODs) in scarce subjects in some secondary schools in KwaZulu-Natal?

This broad key question has been tackled by addressing the following key questions:

- How do HODs perceive and understand educational reform in schooling in relation to their roles and responsibilities?
- What is their perception of how these educational reforms have affected their professional lives and work as middle managers?

1.4 Rationale for the Study

This research is located within a larger international research project exploring the impact of globalisation on education in several countries. Schools and their purposes are changing at a faster pace now than any other period in the history of schooling (Smyth, J., Dow, A., Hattam, R., Reid, A. and Shacklock, G. 2000). Schooling in the twenty- first century has been perceived as the vehicle for economic and social advancement of nation states (Dimmock and Walker, 2000). This perception about schools has transformed schooling and the management of schools into being more businesslike (ibid). Dimmock and Walker (2000) argue that there are dangers in transposing business management and leadership to education because they have different agendas and purposes. Different perceptions about schooling have made the roles and responsibilities of school managers more complex. After 1994 the South African Education experienced transformation in governance of schools through policies and regulations. Mulford (2003) argues that the new public management has become a dominant approach in the governance of schools.

Mulford (2003) argues that the New Public Management (NPM) is characterised by effective school leadership for the successful implementation of new curriculum changes and new administrative roles. Mulford identifies three key elements that are important in effective school leadership:

- The first element is market, which associates effective school leadership with good entrepreneurship and salesmanship.
- The second element is accountability, which is about possessing expertise in performance management system.
- The third element is decentralisation, which could be described as building a collaborative culture with other stakeholders in education. (Mulford, 2003, p.8.)

The hallmarks of NPM are the reduction in government's role in service provision; downsizing and decentralisation in the public sector; deregulation of the labour market; the imposition of the strongest feasible framework of competition and accountability on public sector activity; explicit standards and measures of performances, clear definition of targets and indicators of success; a greater emphasis on output control – a stress on results, not processes; moves to new forms of corporate governance; a shift from public funding to private sector provision (the privatisation agenda); and a reduction in the self-regulating powers of the professions (Mulford 2003, p. 8).

Mulford (2003) states that the influence of NPM under the restructuring of public schooling is characterised by decentralisation through school self-management; the injection of competition between schools; greater demands for financial accountability; an increase in consumer control through school governing councils; recentralisation of curriculum and assessment control; expanding the powers of school principals; increasing pressure for outcomes based assessment; the exposure of school performance to public scrutiny; the assessment of teachers against employer defined competencies; and tighter regulation of the teaching profession (Mulford 2003, p. 8). Therefore the effect of educational transformation on school leaders needs to be researched.

In South Africa teachers are the largest single occupational group and profession in the country and are viewed as professionals that are working under extremely complex conditions (DoE, 2007). This complexity of teaching in South Africa has been the result of the legacy of apartheid and of the introduction of new democratic education policies (ibid). The introduction of democratic education in South Africa, after 1994, is marked by tremendous changes in education. The Government Gazette (2007) states that:

Since 1994 they had to cope with rationalisation of the teaching community into a single national system, the introduction of new curricula, which emphasise greater professional autonomy and require teachers to have new knowledge and applied competences, including the use of new technologies, and radical change in the demographic, cultural and linguistic composition of our classrooms.
(DoE, 2007)

Since 1994, when the new democratic government came into power in South Africa, South African education has experienced major educational reforms that led to the introduction of democratic education. Democratic education in the South African is an education that aims at redressing the inequalities of apartheid education. Chisholm (2004) highlights the key shifts that have been introduced by the transformation of apartheid education into democratic education in South Africa. She mentions the restructuring of eighteen racially segregated education departments into nine departments; centralised control of schools; revamped curricula; reorganised management and the administration of schools; new forms of assessments and new qualification framework. The list of things that marked the transformation from apartheid to democratic education in South Africa has not been fully exhausted but I have targeted few that are related to this study.

The most crucial points highlighted by this study are: how teachers interpret and perceive democratic education? What practical changes have been introduced? What is the role of the state in the democratisation of education? What are the key drivers of change? What is the impact of democratic education on the roles and responsibilities of teachers in management positions in secondary schools? These key broad questions have stimulated this study.

South African education after 1994 has been marked by a remarkable shift from apartheid education to democratic education. Consequently, a fair and equal education system with radically a different curriculum was adopted by South African schools to infuse human rights and citizenship in education. The merger of all educational departments from previously segregated departments of education into one democratic education department for all races forced the school managers to manage the transition (DoE, 2007)

The management of the transition resulted in different struggles and tensions that were experienced by school managers at all levels (DoE, 2007). A number of transformative policies were adopted as part of the implementation of the Outcomes Based Education system and a new curriculum, first C2005 and then the revised National Curriculum. This has significantly affected the roles and responsibilities of school managers. Education reforms have had an impact on teachers and have implications for the management of schools.

According to Personnel Administration Measures (PAM) as described by the Employment of Educators Act of 1998 the Heads of Department (HODs) are part of the instructional leadership. They are responsible for taking the lead in putting their school curriculum into practice and improving it. They should also make sure that there is a culture of teaching and learning in their schools. Some of the duties assigned to HODs are that of supporting teachers and supervising them. PAM highlights that HODs should participate in an agreed school or educator appraisal process in order to regularly review their professional practice with the aim of improving teaching, learning and management. The tension is because of the contradiction between these dual roles – one of supporting and the other of policing the teachers. Research needs to be conducted into the effect of this tension on the professional lives of HODs.

Moos (2003) argues that school management and leadership has become increasingly more attractive to researchers over the past 10-20 years as leaders' position and function changed fundamentally from mainly being in charge of monitoring that everything took

place according to what has been prescribed to them; focussing on educating learners and being responsible for other administrative responsibilities (Moos, 2003).

My study has therefore aimed at investigating the effect of educational reforms on the professional lives and work of HODs; focussing on whether the roles and responsibilities of HODs are creating tensions in their work as school managers. Dimmock and Walker (2000) argue that policies and practice in schools are influenced by international developments like global economic developments, communication and technology. Therefore complexities of teachers' work need to be researched focusing on the roles and responsibilities of HODs as school leaders and curriculum implementers in secondary schools, within the context of both national and global education transformation.

1.5 Globalisation and Education Reform

Globalisation has many complex implications for education (Edwards and Usher, 1997) The implications of globalisation for education have been researched in different countries and have revealed that education reforms associated with globalisation have detrimental effects on educators. Studies conducted (Robertson, 2000) in different countries about the impact of educational reforms associated with globalisation on the work of teachers in different countries like Australia, United States of America, New Zealand and England have revealed that globalisation is the key driver of educational reforms, and these educational reforms have a negative impact on the professional work and lives of educators (Robertson, 2000).

The impact of globalisation on the economic system and social policy has become the focus of research in many parts of the world. The impact of globalisation on education policy, in particular, is gaining more attention, especially in the developing countries like South Africa. The relationship between globalisation and a range of issues, such as economic policy, the commodification and privatisation of education, mergers of educational institutions, language policy, formalisation of non-formal education and human resource development are issues that require greater attention (Bond, 2004).

Rikowski (2002) views globalisation as the core of all the economic, social, political and cultural trends. According to Rikowski education is perceived as a vehicle of promoting the economic growth of the country. Vally (1999) argues that Growth Economic Accelerated Redistribution (GEAR) promotes neo-liberal policies that are based on the belief that there is a direct link between education and economic growth. The notion of linking schools and economic growth promotes the marketisation of education. Kahn (2001) reported that South African education had to be restructured to develop strategies to accelerate skills development programmes for areas that are critical for a more competitive economy. The skills development that Kahn is referring to is based on subjects that are in short supply such as Mathematics, Science and Technology. However, Codd (2005) argues that the education that prepares learners for the world of work does not improve the economic growth of the country.

This study aimed at getting the perceptions of the HODs on/about how the education reforms have affected their professional lives and their work as teachers who are managing subjects that are targeted for skills development in terms of their scarcity.

1.6 The Impact of Globalisation on School Leaders and Managers

Smyth (2002) quotes a case study research that was conducted in an Australian primary school about the experiences, tensions and contradictions of teachers and school leaders. These school leaders included principals, assistants and deputy principals, co-ordinators and teachers with positions of responsibilities. The study showed how

...teachers and school leaders in disadvantaged schools had to significantly reassess what they were already doing successfully in the light of altered patterns of control, autonomy, parental choice and marketisation (Smyth 2002, p. 464).

The research indicates that there is an increasing hierarchy and distancing of principals and other senior managers in schools, from classroom teachers, as the principals exert more control over what happens. The study also highlighted the intensification of the workload of principals as they become the education department's 'watchdog' (ibid. p. 465). The conclusion of this study is that teachers are constrained by policy reforms in schools.

Ball (1993) conducted a study in a number of secondary schools in the United Kingdom examining the over-determined and over-regulated situation of schoolteachers' work and the matrix of power relations in which they are enmeshed. The research focussed on three main forms of control that are being used in the United Kingdom in an attempt to capture, specify and delineate teaching – the curriculum, the market and management. The study was conducted on senior teachers and school leaders. The research indicated that there is a division of values and purposes of professional culture between managers and teachers. The senior teachers found themselves caught in a serious conflict. This conflict is caused by a dialectical tension between the constraints of the budget or the market, and the survival of the institution. The study also highlighted that marketing and income generation have an impact on the planning and decision-making in all activities performed by senior management in schools. Ball (1993) argues that managers in schools are trapped in 'polyvalent discourses' because they both liberate and enslave. This 'polyvalent discourse' is evident in that 'senior management team are no longer managing education, but managing institutions' (Ball, 1993, p.116). This means the value of an institution is more important than learners as individuals. He also claims that senior teachers' professionalism is replaced by accountability; collegiality by costing and surveillance.

Studies conducted in different countries about the impact of globalisation on the work of teachers in different countries made this study relevant in South Africa; focussing on the impact of educational reforms on the professional lives and work of HODs. The understandings of globalisation, globalisation themes and theories of globalisation have

been used as lenses to investigate whether the restructuring of education is associated with globalisation or not.

1.7 Setting the Context and Sample of the Study

The research site for this study is selected secondary schools in Pietermaritzburg. Schools selected represent the racial, social, gender economic and linguistic diversity of the province. The schools that participated were ex-Department of Education and Training (DET) schools (black rural schools), ex-DEC schools (black township schools), ex-HOD schools (Indian schools), ex-HOR schools (coloured schools) and Model C schools (white schools). The ages of participants ranged from 30–to 50 years. The teaching experience of participants ranged from 13 to 28 years. There were two females and six males in the sample. The racial representation of participants, according to South African categorisation was 3 Africans; 2 Whites; 2 Indians and 1 Coloured. All the participants were Mathematics and Science HODs. All the schools that were research sites were 7-20 km from the city centre of Pietermaritzburg.

The secondary schools have been targeted for the purpose of this study because they include the General Education & Training phase (GET), i.e. Grades 7-9 as well as the Further Education Training phase (FET), i.e. Grades 10-12. These phases include subjects such as Mathematics, Science and Technology, which are scarce subjects used to criteria for selection of HODs. I have targeted Mathematics and Science HODs as school managers who are managing subjects that are perceived as critical subjects that need to be promoted in terms of skills shortages and economic development (Kahn, 2001). Kahn (2001) reported that the South African education had to turn the education system around by employing Human Resource Development Strategies that could improve skills development through accelerated skills development programmes in critical areas such as Mathematics, Science and Technology (M S& T) in order to compete in the global competitive economy. One such programme that was piloted was called the Dinaledi Project whose aims and objectives are (1) to raise participation and performance in senior certificate Mathematics and Physical Science; (2) to provide high quality M S& T

education for all learners; (3) increase and enhance the human resource capacity to deliver high quality MS&T education (Kahn, 2001). The Dinaledi project is driven from the national level with provinces and districts being given minor roles (Taylor, Muller and Vinjevold, 2003). According to Kahn (2001) Mathematics, Science and Technology are the key subjects that are associated with critical skills that are 'essential' to competitive economy.

Studies conducted in New Zealand, Australia, England, and United States of America on educational reforms concluded that education reforms have detrimental effects on education and show the influence of globalisation on education reform internationally (Robertson, 2000). This provides a further motivation for my investigation which is not intended is not to replicate any research study conducted. My interest is to investigate how education reforms in South African Education have affected the professional lives and work of educators (classroom practices, assessments, relationships) in middle management positions in secondary schools. My study further aims at investigating how the HODs understand and perceive educational reform, their changing roles and responsibilities and the effect of these educational reforms on their work.

1.8 Research Approach

The study has been positioned within a critical paradigm. The rationale for the choice of the critical paradigm is that the critical paradigm interrogates power relations and uncovers the underlying forces that shape the dynamics of educational institutions (Cohen, Manion and Morrison, 2007).

Thus my study could be perceived as falling within a critical paradigm. The critical paradigm interrogates power relations and aims to uncover the underlying forces that shape the dynamics of educational institutions (Cohen, Manion and Morrison, 2007). The critical approach has been appropriate to analyse the teachers' workplace because it incorporates the relations of teachers arising within a capitalist patriarchal ideology (Robertson, 2000). Critical theory aims at promoting critical awareness and

consciousness; breaking down the institutional hierarchy and ideologies that propagate and reproduce social inequalities in our society (Henning, 2004). (Cohen, Manion and Morrison, 2007) highlight that critical theory challenges power dynamics in our society. Therefore critical theory challenges the abuse of power through hegemony. The aims of critical theory are 'social justice' (Griffiths, 1998, p. 179). Griffiths goes on stating that the term social justice has a 'long history in philosophy and politics'. (Cohen, Manion and Morrison, 2007, p.27) state that the critical theory and educational research aim at researching the relationships between school and society examining how schools reduce and promote inequalities in our society challenging the social construction and curricula.

The main approach of critical theory is therefore ideology critique (Cohen, Manion and Morrison, 2007). Ward (2006, p. 7) also argues that the public belief in 'human nature' views power and hegemony as inevitable and an irresistible human reality. This public belief is criticised for maintaining existing power relations that oppose social change. The notion of the 'human nature' of hegemony justifies the inequalities in the society through the process where the disempowered are persuaded to participate in their own disempowerment. The aim of critical theory is to transform society for a better world where domination and oppression is challenged by this notion of 'human nature' (Ward, 2006).

1.8.1 Research Methodology

My study could be considered a case study. Case studies are bound by their methodology. A case study is an in-depth study of a group of people (Homell, Miller, Hee Park, Sattler, Schack, Sperry, Widhalm, and Palmquist, 2005). A case study describes the state of a person in a particular situation (ibid). A case study tries to capture the participants' perceptions and thoughts about a particular phenomenon or situation (Cohen, Manion and Morrison, 2001). A case study needs multiple methods in order to capture the full 'case' (Henning, 2004, p.32). Cohen, Manion and Morrison, (2007) cite Hitchcock and Hughes (1995, p.317) who suggest seven hallmarks for case studies (discussed in Chapter 3). The hallmark that best suits my research is the one that states that case studies 'focus on

individual and group of actors, and seek to understand their perceptions of events'. My research has focussed on HODs as a group and their perception about education reforms in their schools. Cohen, Manion and Morrison (2007) regard case studies as good for educational research.

The method used in this study is inductive, using semi-structured individual interviews and a focus group interview as data collection techniques. Data has been analysed by categorising it into concepts, themes or patterns. Eventually, concepts were categorised to form sub-themes. Qualitative research uses qualitative methods that involve textual or verbal data (Henning, 2004).

I have opted for purposive sampling that has been justified by an understanding of non-probability sampling that is appropriate for qualitative research that deals with small samples. The teachers who are included in this sample are eight HODs from eight secondary schools in Pietermaritzburg in KwaZulu-Natal. The schools have been chosen following the demographics of education in South Africa prior to 1994. The selected schools represented the racial, social, gender, economical and linguistic diversity of the province.

1.8.2 Theoretical Framework

I have used critical theory; drawing on globalisation theories and globalisation themes as analytical tools for examining and analysing educators' perceptions and experiences. These are drawn out from, and discussed in detail in, the literature review.

1.9 Outline of the Chapters

In this chapter I have stated the purpose of this study and I have identified the need for research on the changing nature of educators' professional lives and work in the context of education reform. I have briefly explained the research approach that has been

followed in this study. My study has been framed by the critical paradigm and has used critical theory drawing on globalisation theories and globalisation themes as analytical tools. The data in this study that has been collected is qualitative in nature.

In Chapter 2, I have reviewed the literature that has been used to generate a conceptual framework for the study.

In Chapter 3, I have presented and explained the methodological approach I have used in order to generate and analyse data. I have presented a discussion of the data collection techniques and the procedures that have been followed.

Chapter 4 presents the major themes and sub-themes that emerged from the qualitative data that was generated and analysed.

In Chapter 5, I present the interpretation and discussion of the findings that were illuminated by data; using the globalisation themes as organisers.

Chapter 6 concludes the thesis by summarising the findings, making recommendations, outlining the shortcomings of the study, and proposing areas for further study.

CHAPTER 2

GLOBALISATION, EDUCATION REFORM AND EDUCATORS' WORK

2.1 Introduction

In this chapter I have drawn the conceptual framework from a review of literature on education reform, globalisation and its impact on leadership and management in schooling.

I have organised the chapter by first exploring what is meant by globalisation and presented theories of globalisation. I then present a discussion of globalisation and education reform. This is followed by sections that explore broad organising themes related to globalisation that will also serve as an analytical framework.

2.2 What Is Globalisation?

There are many definitions of globalisation. The International Labour Resource and Information Group (ILRIG, 1998) defines globalisation as a term that can mean different things to different people. How can a single term have different meanings? The response to this question is that globalisation is an issue of struggle (ILRIG, 1998). Torres (2003) argues that globalisation is far too complex to be presented in a simple formulaic manner. He goes on to say that globalisation should not be perceived as a new thing but it can be traced back to the reign of the Roman Empire. Globalisation is associated with imperialism. Stein (1980) defines imperialism as: 'the policy of extending the rule or authority of an empire or nation over foreign countries, or of acquiring and holding colonies and dependencies' (ibid. p.666). Porter (1999) cited in Mortimore (2001) defines globalisation as the process by which the peoples and nations of the world are

increasingly drawn together into a single entity. Rikowski (2002) views globalisation as being the core of all economic, social, political and cultural trends.

The economic, social, political and cultural trends could be best understood by looking at Lechner's (2004) three globalisation theories. He puts forward the following theories: World-System Theory, World Polity Theory and World Culture Theory. I will unpack these theories briefly because they illuminate ways of looking at globalisation.

2.2.1 World-System Theory

The first theory is the World System Theory. This theory views globalisation as a world economic system that propagates capitalism worldwide. Stein (1980, p.2000) defines capitalism as 'an economic system in which the investment in and ownership of the means of production, distribution, and exchange of wealth is made and maintained chiefly by private individuals or corporations'. It is believed that the accumulation of wealth by capitalists is based on exploitation of workers. Capitalism is shaped by the ideology of neo-liberalism. Neo-liberalism supports a 'free market' system that calls for an opening of borders to fast track the national and international economic technological and financial exchanges (Torres, 2003). Lechner (2004) argues that the capitalist world economic system is perpetrated through 'structural based' political systems. Kelsey (2002) states that after the Second World War the Organisation for Economic Co-operation and Development (OECD) countries pursued the New International Economic Order in 1970; which resulted in a new economic paradigm (ibid).

Different people viewed this new paradigm shift differently. The proponents of globalisation view this system as 'inevitable and irreversible' (Kelsey, 2002, p.7). The contending views against this theory state that the new capitalist economic system erodes the national democracy and sovereignty of states by imposing neo-liberal policies on nation states and eventually, perpetuating social inequality (ibid). The economic domination of the rich states compelled the International Monetary Fund (IMF) to help countries with recession loans, which then led to the structural adjustment law that has

impacted negatively on education. The cut in education budgets; privatisation of education and decentralisation of education institutions are seen to be the effects of introduction of structural adjustment policies on education (Torres, 2003).

2.2.2 World Polity Theory

The second theory is the World Polity Theory. According to this theory states are rationalised as ‘systematically organised and operate according to formal rules’ (Lechner, 2004, p.3). This theory highlights that there are world organisations that set universal rules that are applicable to all nation states that share common frameworks. The major governmental organisations are the United Nations (UN) (looking at the universalisation of human rights) the World Bank (WB), the World Trade Organisation (WTO), the International Monetary Fund (IMF) and other international organisations. These world organisations shape how institutions and cultural bodies govern their nation states (Raiser, 2002). Human rights issues and the concepts of ‘global citizenship’ are crucial in this theory. The introduction of democratic education in South Africa challenged the South African Education Department to consider education as a right to all citizens as prescribed by the United Declaration of Human Rights (UDHR) and the South African Constitution.

World Polity Theory is criticised for coercing nation states to import a ‘good deal of symbolic educational reform via national policies and control systems’ (Lechner, 2004, p. 3). According to this theory, nation states are not enjoying state sovereignty; instead they import education policies that make them compete internationally.

2.2.3 World Culture Theory

Let me present the third and the last theory, the World Culture Theory. Dimmock and Walker (2000) argue that culture is affected by globalisation. If therefore culture is affected by globalisation then the world is seen as a ‘global village’ (Raiser, 2002, p.3); a single place with a common culture. The global village in this instance refers to the

notion that nation states are viewed as being part of the whole world. If there is homogeneity of culture then culture is influenced by the world's hegemonic structures that can lead to the promotion of one culture and the suppression of other cultures. World Culture Theory is criticised for the promotion of one culture at the expense of other cultures (Lechner, 2004).

2.2.4 Neo-Liberal Globalisation

Torres (2003) explains globalisation by arguing that globalisation is shaped by the ideology of neo-liberalism. He claims that there are four faces of globalisation that are interrelated in a fairly coiled fashion. The first one is globalisation from above. This form of globalisation is shaped by the ideology of neo-liberalism. Theodorson and Theodorson (1969) define liberalism as:

An ideology which developed in the eighteenth and nineteenth centuries as a movement for individual liberty in many realms of life - political, economical, and religious. Liberalism supports free competition and it is also opposed to all but the most essential governmental interference in economic activities (Theodorson and Theodorson, 1969, p.230).

Theodorson and Theodorson highlight that liberalism promotes individualism in our societies. Neo-liberalism is a modified form of liberalism. Neo-liberalism supports a 'free market' system. The free market system calls for an opening of borders to fast track global economic, technological and financial exchanges. A free market system is associated with competition, privatisation, commercialisation and capitalisation (Torres, 2003). For the purpose of this research I will elaborate on the concepts of competition and privatisation later.

The second form of globalisation is globalisation from below (anti-globalisation). There are individuals, institutions and social movements that actively oppose globalisation. I have mentioned earlier that globalisation is viewed by different people differently.

Consequently globalisation from below is a counter attack on corporate globalisation's ideologies.

The third form of globalisation is the globalisation of human rights. This form of globalisation encompasses 'life long learning' and 'global citizenship' (Lechner, 2004). This form of globalisation advances cosmopolitan democracies and plural citizenship. According to this form of globalisation individuals are no longer perceived as isolated from the whole world. This means that, what is happening globally effects individuals wherever they are.

A good example of what I have mentioned above in global citizenship is the globalisation of the international war against terrorism. This is the fourth, and the last form of globalisation. Torres (2003) regards this as a new form of globalisation that was incited by the attack on the World Trade Centre. This incident reflects Lechner's (2004) World Culture Theory. Kelsey (2002) regards the September 11 incident as associated with imperialism; where the other states become colonies of the United States of America. Kelsey goes on arguing that this incident highlights the tyranny of United States of America over other nation states.

The coalition wars led by the United States of America against Islamic regimes in Afghanistan and Iraq were an anti-terrorist response with the aim of providing 'security and control of borders, people, capital, and commodities that is the reverse of open market and high paced commodity exchanges (Torres, 2003, p.2).

The proponents of globalisation viewed this incident as a strategy of 'terrorists' who resorted to violence, challenging the American ideas on economic globalisation (Kelsey, 2002, p.7).

The impact of globalisation on education can perhaps best be highlighted using the notion of 'globalisation from above'. This form of globalisation is framed by an ideology of neo-liberalism that propagates a 'free market system' (Torres, 2003). Globalisation from above is associated with particular concepts and themes that will form critical devices for

this study. These are: competition, privatisation, decentralisation, efficiency and accountability, new managerialism, flexibility, accreditation and universalisation. How does globalisation from above impact on education? Torres (2003) argues that the impact of globalisation could have both a direct and indirect impact on education. An example of indirect impact of globalisation on education cited by Torres is that globalisation from above could be traced in the way in which national economies are enforcing structural adjustments on education policies.

Globalisation also has its proponents who point to ‘positive’ aspects related to it. ILRIG (1998) argues that some of the proponents of globalisation like the South African Chamber of Commerce view globalisation as the best economic system based on fairness and rewarding people on merit. Globalisation is also ‘linked to the rapid changes in the field of mass communication transforming the world into the ‘global village’ (Raiser, 2002, p. 3). Raiser goes on to state that globalisation could be associated with ‘modernity’, which is associated with the new social order. The new social order could be understood as a way of coercing all nation states to open their border and trade with other nation states. The new order propagates a ‘free market system’.

The definition of globalisation by different scholars, Lechner’s theories of globalisation and Torres’s faces of globalisation form the basis for understanding the connection between globalisation and education reform. The following section will briefly discuss social justice perspectives on globalisation.

2.3 Globalisation in South Africa

The impact of globalisation on economic system and social policy has become the focus of many scholars in different parts of the world including South Africa. The impact of globalisation on education policy in particular, has attracted a great deal of attention, especially in developing countries such as South Africa. The relationship between globalisation and a range of issues including economic policy, the privatisation of education, mergers of educational institution, language policy, formalisation of non-

formal education and human resource development demands greater scrutiny (Bond, 2004).

2.4 Social Justice Perspective on Globalisation

This competition of nation states can be best understood by linking it to Robertson's analogy of the discourses of teachers' work (Robertson, 2000). Robertson proposes three broad perspectives of post-Fordist discourses that could be used in understanding and reshaping the nature of teachers' work and their workplaces. These perspectives could be distinguished by their 'critical focus upon the structure and organisation of power within the workplace and wider society' (Robertson, 2000, p. 125).

These perspectives are: (1) new organisational principles, (2) new social visions, and (3) critical social perspectives. I am going to unpack these perspectives later.

As has been suggested previously, the notion of globalisation is contested and therefore several perspectives are possible, two of which are emphasised in this literature review, in the discussions that follow here in Sections 2.4.1 and 2.4.2. Later in Section 2.5, the discussion identifies how new organisational principles, which have their origins in the market, are finding expression in education; and draws on a variety of studies that provide an analysis and critique of this both from a liberal perspective and from a critical perspective.

2.4.1 Neo-Liberal Notions of Social Justice and Globalisation

This perspective views the relationship between capitalism and labour as non-exploitive. This is associated with neo-liberal perspective. Robertson (2000) calls this perspective: the new social vision. According to Robertson the new social visions focus their 'attention to understanding the changing nature of social relationship as a result of transformation in the cultural or economic spheres' (Robertson, 2000, p.128). This perspective proposes that workers should fit into the marketplace. The constant change in

the work place is interpreted as the way of fitting into predictable markets and consumer tastes.

The main concern for Robertson (2000) is the relationship between teachers and the state, since the educational institutions have adopted the organisational principles and new social visions that force workers to compete or be at risk of losing their jobs like all other workers. The new social visions are propagating rules and regulations on how teachers teach, what they teach and how well they teach (Robertson, 2000, p. 100). Hatcher (2004, p.1) states that adoption of neo-liberal policies in education ‘transforms the schooling system from a social democratic to a neo-liberal system whose primary objective is the production of human capital for economic competitiveness’. Hatcher argues that the neo-liberal policies in education challenge the ‘old bureaucratic-professional system of management’ in schools to ‘performativity’ (Hatcher, 2004, p.1). The management coerces teachers to perform up to a certain standard set by the government. In other words the management increases control over the teachers.

In South African education this ‘performativity’ can be associated with an Integrated Quality Management System (IQMS) as part of Quality Assurance system. The Personnel Administration Measures (PAM) is a document that specifies the roles and responsibilities of HODs in schools. One of the crucial roles of HODs is the performance appraisal of educators. Hatcher (2004) argues that the management in a school exerts power on educators through managerial control to comply with the rules and regulations of the school. According to Hatcher (2004) the compliance of teachers to do what is expected of them, is to gain their commitment by persuading teachers to comply with management’s directive. The teacher’s compliance could be achieved through coercive strategies like incentives awarded to teachers who are performing. Hatcher critically analyses this ‘performativity’ as a strategy adopted by the government to coerce the management to fulfil its agenda by making them accountable and responsible for meeting the government’s objectives in education. Considering what Robertson (2000) and Hatcher (2004) have stated about the adoption of neo-liberal policies in education

McLaren (2003) argues that the neo-liberal perspectives on education are alienating to teachers.

Robertson (2000, p.49) discusses the changing context of teachers, looking at the United States and England, tracing the political order of teachers' workplace. She maps the history of teachers' workplaces dividing it into periods; the period from 1850-1900; which she regards as laissez-faire liberal settlement. She argues that this period is marked by 'a new universalism' that acknowledges that education was applicable to all groups (Robertson, 2000, p 52). She regards teachers' work as having status although salaries are low.

The period 1900-1945 is marked by Robertson as the 'period of liberalism; age of capitalism' (p.51). The period that follows the Second World War is regarded as the enlightenment period and the period of industrialisation. She claims that this period is burgeoned by new technologies. She argues that this period is characterised by the struggles of teachers framed by 'national and international regimes of accumulation (market and wage relation) and on the other hand by particular institutionalised arrangements that reflect social and political conflicts' (Robertson, 2000, p. 69). Robertson highlights that the case study she conducted in England and United States revealed that the struggles of teachers were not only caused by conflicts within the country; but the international influence added more stress on teachers.

The late 1800s and early 1900s has shifted the status of teachers from status professionalism to occupational professionalism (Robertson, 2000, p.100). Robertson argues that this period is preoccupied with control of labour. The evidence that has been cited by Robertson is the control based on what teachers teach, how they teach and how well they teach (Robertson, 2000, p.100).

2.4.2 Critical Notions of Social Justice and Globalisation

Robertson (2000) highlights that in order to understand a certain phenomenon one needs to critically analyse the social relations and frameworks that shape that phenomenon. The critical social perspective critically analyses ‘the wider social relations and frameworks that give rise to particular practices and events’ (Robertson, 2000, p.8). Robertson criticises both new organisational principles and new social visions as disempowering and alienating. She claims that new organisational perspectives and new social visions responsible for the erosion of worker control could be seen in the intensification of work, greater managerial control, the abandonment of the social wage and supportive labour policies, increased segmentation and management-driven flexibility’ (Robertson, 2000, p. 130). She argues that the new social visions and new organisational principles are based on exploitation. She views the first industrial divide and second industrial divide as a move towards the commodification of basic social life services like education. My study explores how the HODs (educators in middle management) are positioned by education reform in their schools where neo-liberal education policies have been implemented. Neo-liberalism is a capitalist ideology that calls for the privatisation of education, decentralised education systems for effective control and competition (Newman, 2005).

Mulford (2003) argues that education has been perceived as a key to addressing the economic problems. The notion of linking education and economy has put an enormous pressure and responsibility on school leaders (ibid). Consequently, Mulford highlights that the ‘effective school leaders are associated with sustainable education reform (Mulford, 2003, p. 5). The new approaches to school governance are therefore reflected in the changing role and responsibility, recruitment and development of school leaders. According to Mulford the governments of nation states employ three major approaches to ensure an ongoing educational reform in their schools. These major approaches are: old public administration (OPA), new public management (NPM) and organisational learning (OL). Mulford (2003) argues that public schooling has an element of all the development approaches (OPA, NPM and OL) that are constantly changing from time to time; but the

NPM has been identified as the dominant approach in educational school governance through strong dependency on effective school leaders (ibid).

The OPA is characterised by:

The rule of law, accountability, reliability predictability, trust building, common good consistency and it is based on public service; whereas the OL is identified from other approaches as based on trust, collaboration teamwork networking, monitored mission, constant quality improvement, risk taking and professional development (Mulford, 2003, p. 7).

For the purpose of my research I will not elaborate on all the new developmental approaches as suggested by Mulford, but I will briefly discuss the hallmarks of NPM as suggested by Dempster (2002) quoted by Mulford (2003):

The NPM is characterised by a reduction in government's role in service provision; downsizing and decentralisation the public sector; deregulation of the labour market; the imposition of the strongest feasible framework of competition and accountability on public sector activity; explicit standards and measures of performances, clear definition of targets and indicators of success; a greater emphasis on output control – a stress on results, not processes; moves to new forms of corporate governance; a shift from public funding to private sector provision (the privatisation agenda); and a reduction in the self-regulating powers of the professions (Mulford 2003, p. 8).

Mulford goes on giving the influence of NPM under the restructuring of public schooling as cited by Dempster (2002a, p.17) as follows:

Decentralisation through school self-management; the injection of competition between schools; greater demands for financial accountability; an increase in consumer control through school governing councils; recentralisation of curriculum and assessment control; expanding the powers of school principals; increasing pressure for outcomes based assessment; the exposure of school performance to public scrutiny; the assessment of teachers against employer defined competencies; and tighter regulation of the teaching profession (Mulford 2003, p. 8).

2.4.2.1 Globalisation Leads to the Commodification of Education

Globalisation has many complex implications for education (Edwards and Usher.1997). McLaren (2003) uses the Marxist perspective in analysing education reform in North America. He claims that a capitalist outlook is evident in the privatisation of education and the cutback in government's expenditure on education. Roberts (1998) critiques curriculum reform in New Zealand. He argues that the neo-liberal perspectives on curriculum reform in New Zealand, has promoted neo-liberal individualism ideology in education. The neo-liberal individualism view education as a commodity. Both McLaren (2003) and Robertson (2000) witness the 'commodification' of education that is evident in the privatisation of education (McLaren, 2003; Apple, 2001; Roberts, 1998, Ball, 1993; Edwards and Usher, 1997). The learners become 'consumers' in the education field when they have to buy education. McLaren (2003) is against the commodification of education. He states that the idea of schools being financed by corporations promotes 'profiteerism'.

The commodification of education exacerbates inequality by symbolically excluding learners from poor socio-economic background who cannot afford to buy education. Apple (2001) argues that this system has problems, because it reduces teacher autonomy and increases growing scarcity of resources both emotional and physical. Apple says:

Further as in the research in England, in nearly all of the countries studied the market did not encourage diversity in curriculum, pedagogy, organisation, clientele, or even image. It instead consistently devalued alternatives and increases the dominant models. Of equal significance, it also consistently exacerbated differences in access and outcome based on race, ethnicity, and class (Apple, 2001, p. 77).

Apple (2001) argues that the commodification of education leads to the unequal access to quality education. Studies conducted on the privatisation of education in New Zealand concluded that market principles privileged families with higher socio-economic status and disadvantaged learners from the working class, poor and of colour. The implication is that to these learners education is no longer a human right.

2.4.2.2 Neo-Liberal Policies in Education Lead To Inequality

Education can be easily manipulated by those who have economic power (McLaren 2003). McLaren states that capitalism and exploitation are functional equivalents to the globalisation of capital which Lenin termed imperialism. McLaren's statement highlights that education is never neutral (Roberts 1998). Capitalism is an economic system that is founded on exploitation. The nation states that have economic power manipulate education to prepare learners for the world of work. Koutselini (1997) states that the curriculum debate should focus on challenging the status quo by asking critical questions like which values, viewpoint, strategies and forms of knowledge do future students need to acquire, in order to participate actively and creatively in the world of tomorrow? Ross (2000) concurs with Koutselini by suggesting that critical questions need to be considered when planning curriculum. These authors highlight that curricula have been manipulated as a means of social, economic, cultural control and development. Kellner (2003) concurs with Paulo Freire in criticising, "banking education", 'where education is perceived as a form of indoctrination, enforcing conformity to dominant values and social reproduction' (Kellner, 2003, p. 55). He argues that a critical theory of education must be rooted in the critical theory of society that conceptualises the features of capitalised societies that produce unequal social classes.

2.4.2.3 Neo-Liberal Policies in Education Prepares Learners for the World of Work

Kellner argues 'that education systems, curricula and pedagogies were designed for the production of a labouring subject who has become an 'endangered species' in the current economic, social and cultural system' (Kellner, 2003, p.59). According to Kellner, (2003) the neo-liberal policies in education associated with globalisation prepare learners for the world of work. To him the global economy has demanded rapid restructuring of education; where steady jobs for well-disciplined and performing students are disappearing, whilst the new jobs in the high-tech sector are emerging (ibid, p. 62). He continues to argue that education that prepares learners to be a 'compliant work force' provides learners with skills of print literacy and discipline in order to prepare them to fit

into the modern corporations and corporate economic world. Consequently, educators need to be critical in their praxis as educators.

Neo-liberalism is an unfair system that leads to social inequalities (McLaren, 2003; Koutsellini, 1997). Koutsellini gives a word of caution that:

An economic orientated conception of education and the choice of curricula topics based mainly on international economic competition do not lead to the development of an economy; but it leads to the reproduction of the existing order of things both at local and global level (Koutsellini, 1997, p. 93).

McLaren (2003) argues that the class struggle is crucial in education for liberation to him capitalism tries to reduce every human activity to market profitability. McLaren argues that 'globalisation of capital was advertised as the designated saviour of the world's poor and powerless, yet its function has been deadly alienating' (McLaren, 2003, p. 66).

Woods argues that the vision of IMF and World Bank has been to ensure that there was trade liberalisation, the privatisation of state owned enterprises, the opening up of developing countries to foreign investments and deregulation of labour markets in membership countries. The founders of the IMF and World Bank aimed at helping all countries to balance growth in the world economy by protecting employment and standards of living of all citizens in all nation states (Woods, 2006). Unfortunately, that plan did not materialise, due to certain constraints. The failure of the IMF and WB to meet their target led to endless criticism (Woods, 2006). The major critique of these two economic giants is that their opponents regard them as bastions (strong holds) of capitalism and globalisation (ibid).

2.4.2.4 Educators Need To Challenge Neo-Liberal Policies through Critical Pedagogy

I have mentioned previously that the neo-liberal policies associated with globalisation have detrimental effects on the lives and work of educators. Robertson (2000) has witnessed that teachers are alienated by globalisation. McLaren (2003) argues that the

neo-liberal approaches led to surveillance, reduced teacher autonomy and more social inequalities in education. McLaren suggests that there should be a 'move from a globalised imperial export strategy to an integrated domestic economy' (McLaren, 2003, p.89). To him globalisation is a way of entrenching social inequalities. He understands that globalisation is inevitable (ibid p. 90) but he also argues that the capitalist ideology through globalisation needs to be challenged through critical pedagogy.

Critical pedagogy encourages educators to reject established laws and institutions (nihilism) because they make them have 'common sense' which needs to be challenged (McLaren, 2003). Nihilism encourages educators to be agents of change by being critical, not colluding with oppressive policies. Hatcher (2004) suggests that the critical education management theories need to be adopted in order to challenge and reject neo-liberal education by critiquing the dominant education theory. McLaren (2003) and Hatcher (2004) claim that the management in schools should 'understand the political and economic context and re-examine their own collusive professional cultures by developing a proactive resistance' (Hatcher, 2004, p. 6). Hatcher argues that the 'proactive resistance' could be propagated by school leaders who become critical about managerialism in schools by challenging the status quo. Therefore the school leaders should perceive themselves as the agents of change. Hatcher (2004) suggests distributive leadership in schools as an alternative to managerialism.

Koutsellini (1997) highlights that managerialism is not the only thing teachers need to resist; the curriculum also needs to be challenged, not in terms of content to be covered, but as a transformative process. He states that the majority of education systems have centralised, bureaucratic curricula that confine the teacher to impart knowledge defined by curriculum. This suggests that teachers are deskilled because they are not curriculum designers as suggested by meta-modern curricula (ibid). Meta-modern curricula could be understood by analysing the word 'meta-modern'. The Random House College Dictionary (1980, p. 839) defines 'meta' as a Greek word meaning "after", "along with", "among", "beyond", "behind" and "often denoting change". I have used the last definition of the word that states that there are changes in the modern curricula.

According to Koutsellini (1997), the modern curricula dictate what needs to be taught by the teachers.

The new critical pedagogy should meet the challenges of globalisation and multiculturalism and radical democratisation to fight against the impact of globalisation in education (McLaren, 2003; Koutsellini, 1997; Kellner, 2003). Kellner further proposes that critical theory in education should aim at the democratic reconstruction of education. Kellner suggests the infusion of human rights values in education through democratic education. McLaren argues that unless class analysis and class struggle play a central role in critical pedagogy; there would be no fundamental change in education. Kellner argues that there is a need to reconstruct education in a way that does not fulfil the agenda of capital and high-tech industries. He feels the efforts to impose a neo-liberal agenda on education, reorganizing schools on a business model; imposing standardized curriculum, is disastrous (Kellner, 2003; Apple, 2001). Kellner also suggests a radical reconstruction and democratisation of education. To him the neo-liberal agenda on education promotes new skills as a response to new technologies and globalisation (Codd, 2005; Kellner, 2003) Hatcher (2004, p.1) states that the adoption of neo-liberal policies in education ‘transforms the schooling system from a social democratic to a neo-liberal system whose primary objective is the production of human capital for economic competitiveness’.

Apple (2001) cautions people about the danger of linking education reform with the ‘world of work’. Apple (2001) highlights that neo-liberal policies involving market ‘solutions’ may be a strategy of reproducing traditional hierarchies of class and races (Apple, 2001; Kellner, 2003). Apple argues that the neo-liberal policies advantage learners from middle class families and disadvantage learners from low economic class. The learners from middle class families are exposed to new technology compared to low economic class learners. Consequently, the learners from racially deprived backgrounds would be disadvantaged in their academic achievement due to their limited exposure to new technologies. Therefore the neo-liberal policies in education perpetrate social inequality. Apple (2001) quotes Ball and his colleagues who conducted research on the effects of neo-liberal reforms related to the marketisation of schools and reported that

educational principles and values are often compromised in favour of commercial issues in curriculum design and resource allocation.

In South Africa globalisation is used to denote the rapid transformation by a process of internalisation that has restructured the way economy and society are organised (Vally, 1999). The effects of the transformation at a macro level are categorised along a number of planes of which education is also implicated. The adoption of democratic education in South Africa has brought new terminology like 'global citizenship' (Lechner, 2004). The political liberation of South Africa in 1994 led to the introduction of these terminologies due to the Universal Declaration of Human Rights (UDHR) (Piper and Roberts, 2003).

South Africa adopted the redistribution and Development Programme (RDP) as the new economic policy after 1994. The RDP policy was replaced by Growth Economic Accelerated Redistribution (GEAR). Vally (1999) argues that GEAR promotes neo-liberal policies that are based on the belief that there is a direct link between education and economic growth. According to Vally (1999) GEAR promotes the marketisation of education. The key development of globalisation is the structuring of educational institutions based on corporate culture/models where social Darwinism, 'laws of competition and conflict with natural selection leading to the survival of the fittest and the elimination of the weak' (Theodorson and Theodorson. 1969, p.387), competition, managerialism and individualism become the dominant hallmarks (Giroux, 2004).

In conclusion the neo-liberal notions of social justice view the relationship between capitalism and labour as not exploitive. However, the neo-liberal policies in education are criticised for not critically analysing the relationship between labour and capital. Robertson (2000) and Hatcher (2004) argue that the neo-liberal policies in education prepare learners for the world of work. The education reforms associated with the neo-liberal policies are detrimental to the work of educators; since they coerce educators to prepare learners for the world of work, lead to inequality and lead to the commodification of education. Neo-liberal policies in education promote managerialism. Critical perspectives argue against the neo-liberal policies in education claiming neo-liberal

policies in education are oppressive to both learners and educators. Robertson (2000, p.100) argues that neo-liberal policies in education have shifted the status of teachers from status professionalism to occupational professionalism.

The neo-liberal policies are characterised by market driven forces, global competitiveness, individual access, measure competencies, development plans, flexibility, new managerialism, decentralisation, universalisation, community involvements, efficiency and accountability (Mulford, 2003). The neo-liberal policies are related to globalisation themes. Some of these globalisation themes are going to be examined in the following section. The globalisation themes are very crucial in this research since they have been used as the lenses for exploring the impact of globalisation on the work and lives of HODs. Although I have explored these themes separately; this has been for analytical purpose. These themes are coiled; they are related to each other.

2.5 The Examination of Globalisation Themes

In this section I will explore the key themes: competitiveness, privatisation, decentralisation, accreditation, flexibility, new managerialism, efficiency, accountability and universalisation related to neo-liberal globalisation and then describe and discuss some studies which have explored these globalisation themes in the context of education reform.

2.5.1 Competitiveness

Competition is one of the crucial themes in globalisation. It has a twin sister, privatisation. What is competition? Theodorson and Theodorson (1969) ‘define competition as the pursuit of goals by individuals or groups, the attainment of which depends upon other individuals or groups not attaining the same or related goals. In competition the objects pursued are limited in supply; and demand exceeds supply’ (Theodorson and Theodorson, 1969, p.66). In other words competition is a struggle or rivalry. How can competition, education and globalisation be associated? According to

Torres (2003) 'globalisation from above' calls for the demolishing of the wall between nation states, creates multiple regional markets and encourages technological, economical and financial exchanges internationally. Globalisation coerces the nation states to compete since the walls demarcating the nation states have been demolished. The poor nation states and rich nation states compete equally. Therefore education, like all other public services compete in the global world. Newman (2005) argues that the liberalisation of education under GATS (General Agreement on Trade and Tariffs) views nation-states as part of the global world. The global world has agencies like the World Bank; the International Monetary Fund (IMF); World Trade Organisation (WTO); United Nations Educational, Scientific and Culture Organisation (UNESCO) and perhaps the Organisation for Economic Co-operation and Development (OECD). These agencies have promoted the model of neo-liberal globalisation (Toedoro, 2003, cited in Torres, 2003). Globalisation as a world polity theory presents a basic understanding of how education competes in the global world. Carnoy (2000) highlights that the quality of national education systems is compared to other nation states globally.

Carnoy (2000) cited in Torres (2003) states that reforms associated with international competitiveness are characterised by a strenuous attempt to create measurable performance standards through extensive standardised testing, new teaching methods aiming at a better performance. Carnoy (2000) cited in Torres (2003) argues that globalisation is having a major impact on education. He mentions three crucial ways: Firstly, the government services are under pressure to reduce the growth of public spending on education and to find other sources of funding for the expected expansion of their educational systems; secondly, the government is under pressure to attract foreign capital to supply highly skilled labour. Thirdly, the quality of national educational systems is increasingly being compared internationally. The Department of Education (2003) defines the key features of the new Further Education and Training (FET) landscape as intended to transform the education system in a way that would allow it to achieve the intended objectives of reviewing the structure of the curriculum and qualification, subject offering, and human resource development (The Department of

Education, 2003, p.2). Carnoy (2000) argues that globalisation and its ideological packaging impact on the overall delivery of schooling.

The neo-liberal policies embrace the concept of global citizenship that acknowledges that teachers can be employed in any democratic country. Therefore teachers compete in the global world. Consequently, standardisation and normalisation are imposed upon classroom practice. The standardisation of curriculum leads to the performance of schools being monitored and compared to other schools. Performance is also linked to appraisal and pay. Ball (1993, p. 107) quotes Lyotard (1984) who describes this as legitimating of education through performativity'. Ball argues that teachers are silenced by these reforms. They display 'silent dissent' (ibid. p. 108) in the discourse of education policy. To him the system is disempowering to both learners and teachers. He continues to argue that the teaching methods associated with progressivism are under attack therefore, teachers 'teach to test'.

Ball (1993) proposed that the key element of the market is competition. The performance indicators and tests shape the behaviour of both learners and educators and drive to what Marx called 'commodity fetishism' consumer politics. The commodity fetishism involves competition. The research results highlighted that marketing and income generation are major priorities in the planning and decision making activities of senior management in many schools. In some schools the discourses of financial planning and economic rationalism have operated in an antagonistic relation to the discourses of teaching and teach (Ball, 1993). This competition has a negative effect on learners. It attaches commodity value to education, something that can be bought and sold. Competition results into sub-set of class. The image of the school becomes more important than individual learners. This competition results into a complex web of competition; where teachers have to compete with each other, learners compete with each other and schools also compete with each other. Oplatka (2004) conducted a study on parental choice and educational market; using institutional theory of organisation as a theoretical framework. It is assumed that parental choice would improve the quality of education and teaching, motivate changes in schools and increase efficiency (ibid) The study revealed that the

parental choice introduced competition among schools. The competition in schools was evident where schools had to attract parents to choose their schools. Oplatka (2004) argues that schools compete in order to conform to the standards set by the parents (consumers). Therefore the schools are gauged by the academic achievement of their learners. Consequently certain schools might have more learners and other school fewer learners. The contextual factors of those different schools are ignored. In a way the neo-liberal ideology of individualism is propagated.

2.5.2 Privatisation

Privatisation is one of the principles of neo-liberalism, closely related to competition. Newman (2005) argues that neo-liberalists regard the state as inefficient in providing services to the people and therefore create conditions for the private sector to provide services to those who can afford to pay. This is another theme linked to neo-liberal globalisation. Privatisation of education is linked to the commodification of education. Privatisation views education as a product or service that needs to be sold like a commodity. In South Africa we have private schools for parents (consumers) who can pay more for the education of their children. This reform leads to the marketisation of schools. ILRIG (1998) argues that GEAR has committed the government to a programme of privatisation and restructuring of state assets. GEAR is a significant new shift from Redistribution Development Programme (RDP) to a new economic policy system. GEAR supports an internationally competitive macroeconomic framework, which contradicts with RDP. The former argues that economic growth should come before redistribution whereas the latter argues for growth through redistribution (ibid p. 33). Privatisation is the most dominant neo-liberal economic reform in education. The supporters of neo-liberal economic reform consider the marketplace as an ideal regulator of services, products and costs. Consequently, schools should be run like businesses. Rikowski (2002) highlights that the nation-states have to deal with and plan for business to take over public services. If education is a product, parents as consumers need to pay for the education of their children. This is a concern to teachers who are teaching learners from poverty stricken families because that threatens the security of their jobs. Privatisation

and competition should be viewed as interrelated (Ball, 1993; Rikowski, 2002; Torres, 2003).

Like all workers in the new economic order the structural adjustment policies impact on the work of teachers. The privatisation of education increases the workload of educators and forces teachers to compete. The HODs are accountable and responsible for the control of educators in order to increase productivity. If schools are run like businesses as I have mentioned earlier, the managers in schools, especially the HODs who are expected to implement the new curriculum in schools, have to increase their managerial control over educators, work tirelessly to market their schools and control the performance of educators they supervise.

The 'commodification' of education leads to increased managerial control of educators. The parents as consumers of the product education need to be satisfied with what is produced by educators. In South Africa the high schools are gauged by their matric results. What is the implication of this for HODs in South African schools? The schools that have good matric results enrol more students than schools with poor matric results. Codd (2005, p.194) argues that education is restricted to make learners acquire skills that can make them productive 'within the changing global labour market'. Codd (2005) argues that this system increases control and managerialism on the work of educators. The teachers have to be managed so that their productivity can be measured through tests; examination results and the performance of learners. The professionalism of educators is eroded by the culture of surveillance and control through increased accountability and responsibility. Accountability and responsibility coerces the educators to comply with standards set for them. Consequently, the autonomy of educators as professionals is eroded. Codd (2005) argues that neo-liberal policies in education reduce 'education into a commodity, private rather than public good'. This means people have to pay for the education of their children. The privatisation of education in South Africa has led to the mushrooming of private schools for the parents who are able to buy education for their children. The parents who have money have a wider choice of schools compared to poor parents.

2.5.3 Decentralisation

Decentralisation is a global reform phenomenon where states decentralise their power. In education, decentralisation has been seen as a way of giving schools more power with the notion that, if schools are given greater educational decision making autonomy, this will impact on the control over curriculum and teaching (Carnoy, 2000). Decentralisation is a way of controlling education institutions at a distance. Ball (1993) views decentralisation as ‘steering at a distance’. That means education institutions are controlled through government policies and legislation. Ball argues that decentralisation is finance driven reform (ibid. p. 50). Decentralisation implies giving educational institutions more power to take decisions about institutions as well as more responsibility for the funding of these decisions, and carrying out these decisions.

Studies conducted in Portugal and England highlight that decentralisation has a major impact on educators. Carnoy (2000) quotes Malen, et al. (1989) and Hannaway and Carnoy (1993) who conducted studies on decentralisation and indicated that school autonomy itself has produced no significant student achievement gains. The impact of decentralisation on the school management team (SMT) increases the roles and responsibilities of the SMT. Utomo (2005) describes the increase in the roles and responsibilities of the SMT by quoting studies conducted in Indonesia about the challenges of curriculum reform in the context of decentralization. Utomo highlights that the studies were conducted when the Indonesian government launched a new national curriculum, in response to both the need to produce human resources to survive in the era of globalisation and the change in the government system from centralization to decentralization. Studies conducted in Indonesia concluded that decentralisation resulted in increasingly and greater responsibility in the role and responsibility of SMT in schools.

Studies conducted in Portugal, England, New Zealand, Australia and South Africa on education reform in schools has revealed that the neo-liberal reforms have impacted on education (Helsby, 1991) Decentralisation has highlighted that control is crucial. Another globalisation theme that deals with control is managerialism.

2.5.4 New Managerialism

New Managerialism is an increased use of management discourses and techniques from the private sector within education (Helsby, 1991). Deem (2001) also defines new managerialism as an ideology to which contemporary business practices and private sector ideas permeate the publicly funded institutions and work practices. She goes on claiming that the ideas of new managerialism are based purely on search for efficiency, effectiveness and excellence. One of the ways in which this is visible in the South African context involves staff appraisal through Integrated Quality Management Systems (IQMS) in South Africa. IQMS are used to appraise educators using overt measurement of performance. Smith (2002) states that those who are in authority are encouraged and trained to see themselves as managers. This highlights that management has a connotation of power.

Ball (1993) states that educational reforms in schools are embedded in three interrelated policy technologies: the market, managerialism and performativity. Ball argues that these three interrelated technologies are a political attractive alternative in the decentralisation of power in education. Dimmock and Walker (2000, p. 35) state that there is evidence of 'loss in transposing business management and leadership to education.' They highlight that the principal is perceived as an office manager focusing on administrative issues because of his/her accountability to the education department. New managerialism is associated with surveillance. Bottery (1999) cited in Dimmock and Walker (2000) gives a word of caution that there are dangers in simply transferring and applying business management to diverse educational contexts in a less than critical fashion

Helsby (1991) conducted a study on new managerialism. Her research focus was to investigate the nature and fate of teachers and teaching in times of dramatic changes and reform. She investigated how teachers responded to a complex set of technical and vocational innovations, then how the secondary school teaching force in England and Wales has been profoundly reshaped by the high profile National Curriculum. Using both a quantitative and qualitative approach, she interviewed teachers and teacher leaders .The

research technique used was interviews The theoretical framework she formulated was discourses analysis, theories of social, economic and political change drawn from Gee, Bourdieu and Foucault who argue that discourse is related to social practices that involve, acting, interacting, believing, valuing, reading, writing, talking and listening as a way of displaying social identity of learners(Helsby,1991).

Many reforms have created constraints and imposed excessive bureaucratic requirements that often diminish both the confidence and the capacity of teachers to perform to the best of their ability (Helsby, 1991). Helsby highlights that despite the unfavourable conditions teachers work under; they remain key agents in determining the quality of education. Teachers dedicate themselves to adapt to the serious or incomprehensible conditions by developing policy initiatives and reforms to meet learner's needs. One of the key words she highlights is managerialism. She quotes Clark, et al. (1994) who identify a deeper ideological process of managerialism that is transforming relationships of power, culture, control and accountability. She regards managerialism as a strategy of controlling all public services. She views managerialism as the government's strategy to control and reduce public expenditure on education. This is achieved through increasing greater accountability, more efficiency and effective management.

She also highlighted 'new work order' and 'new public management' as dominant discourses that create distinct images of schooling and of the role of teachers and teacher managers. She states that 'these dominant discourses involve an element of power as people are channelled into a particular way of 'seeing, thinking and behaving' (Helsby 1991, p.13). Helsby argues that the 'new work order' is full of contradictions, gaps and silences and is far from having achieved hegemony even in the world of business, and certainly not in the world of government and politics or in the world of education (ibid).

Helsby (1991) reports that the introduction of the Technical and Vocational Education Initiative (TVEI) and National Curriculum in England by Margaret Thatcher; has had negative implications for teachers' work To her these initiatives were seen as attempts by the state's policy makers to restrict the autonomy of teachers and to regain control of

school curriculum and legitimated the notion of 'legitimated professionalism'. She reports that these two reform initiatives failed. Their failure was attributed to the teachers. These initiatives claimed that teachers failed to meet the demands of industry and failed to maintain appropriate standards. These two reform initiatives were structured differently but their failure was attributed to teachers who were not part of the planning in the initial stages of it. This was just imposed on them by the government (Helsby, 1991).

Studies conducted in Australian primary schools used a case study approach to study the experiences, tensions and contradictions of teachers and school leaders (Smyth, 2002). The school leaders that participated in the research included principals, assistants and deputy principals, co-ordinators and teachers with positions of responsibilities. The study showed how teachers and school leaders in a disadvantaged school had to significantly reassess what they were already doing successfully in the light of altered patterns of control, autonomy, parental choice and marketisation (Smyth 2002, p.464). This study exemplifies the culture of performativity identified by Gleeson and Husbands (2001), and Fielding (2002) cited in Smyth (2002). The research indicates that there is an increasing hierarchy and distancing of principals and other senior managers in schools from classroom teachers, as the principal exerts more control over what happens. The study also highlighted the intensification of workload of principals as they become the education department's 'watchdog' (Smyth 2002, p.465). The conclusion of this study is that teachers are constrained by policy reforms in schools.

Ball (1993) conducted a study in a number of secondary schools in the U.K examining the over-determined and over-regulated situation of schoolteachers' work and the matrix of power relations in which they are enmeshed. The research focussed on three main forms of control that are being used in the United Kingdom in an attempt to capture, specify and delineate teaching – the curriculum, the market and management. The study was conducted on senior teachers and school leaders. The research approach was a case study. The research indicated that there is a division of values and purposes of professional culture between managers and teachers. The senior teachers found themselves caught in a serious conflict. This conflict is caused by a dialectical tension

between the constraints of the budget or the market and the survival of the institution. The study also highlighted that marketing and income generation have an impact on the planning and decision-making in all activities performed by senior management in schools. Ball (1993) argues that managers in schools are trapped in 'polyvalent discourses' because they both liberate and enslave. Ball's (2003) argument highlights tension and the complexity of management in schools.

Moos (2003) succinctly summarize this tension by comparing the leadership role and the management role of educators (Moos, 2003, p.29). Moos claims that being a manager has a connotation of power, on the other hand leadership refers to being a co-worker with people. Management and leadership in schools have dialectical tension. This 'polyvalent discourses' is evident in that 'senior management team are no longer managing education, but managing the institutions'. This means the value of an institution is more important than learners as individuals (Ball, 1993, p.116).

2.5.5 Flexibility

Robertson (2000) draws our attention to two influential approaches on restructuring discourse in the workplace. These are flexibility and workplace organisations. She claims that the issue of flexibility can be implemented internally and externally. The external flexibility refers to the outsourcing of certain services to providers outside the firm or workplace. Robertson compares the new organisational principles to the former systems where firms used to equip their workers with multiple skills in order to keep workers within the firm. She argues that in the new competitive economic environment outsourcing is encouraged. This means the workers in the firm are at a risk of losing their jobs. The rationale behind outsourcing is decreasing accountability responsibility and minimising costs. Robertson argues that the internal flexibility refers to the deployment of multi-skilled workers to other sites within the workplace. This is also another way of minimising costs. The deployment of multi-skilled workers increases competition amongst workers. Workers could be paid depending on their performance on market demand. An example of this in South African Education is the proposed incentive to be

given to teachers who are offering scarce subjects because they are in high demand. The HODs as managers in schools are affected by the well being of the teachers they manage.

Robertson (2000) states that since the 1980s, the educational institutions and education reformers have adopted flexibility models which, however, do not offer critique of capitalism. According to this model the workplace that has surplus workers relocates their workers in areas where there are shortages. An example of this in South African education is the Rationalisation and Restructuring (or Redeployment) policy where teachers who are in excess are deployed to schools that have vacancies. Robertson (2000) critiques the flexibility model by highlighting that it propagates the capitalist ideology and enhances inequality amongst teachers. According to Robertson (2000) the flexibility model is used as strategy to increase productivity in schools and making teachers insecure in their work. The insecurity is caused by competition and contestation for jobs; due to high level of unemployment.

2.5.6 Efficiency and Accountability

Efficiency and accountability are manifested in legislatures, governing structures and policy makers to increase the productivity of education while decreasing expenditures. The programme in schools that purports efficiency and accountability is the Quality Assurance (Umalusi). The aim of Quality Assurance is to ensure that providers of education and training have qualifications and learning programmes to ensure that they conform to set standards Integrated Quality Management (IQMS) and the whole school evaluation is part of quality assurance.

Studies conducted by Luschei and Siskin in Carnoy, Elmore, and Siskin (2003) to explore how high school leadership respond to standards based on accountability policy. The methodology used was a case study method. The research technique used was interviews. Six high school principals, the departmental heads and individual teachers and administrators participated in the study. This research was conducted in Kentucky and Texas high schools. This was an exploratory study. The theoretical framework was drawn

from distributed theory of leadership. This theory was adopted to examine multiple sources of school level leadership and how this leadership is distributed across the organisation.

This study concluded that without corresponding internal structures of coherence and accountability, externally imposed educational reforms make little or no difference in the quality of education.

Fitzgerald, Young and Grootenboer (2003) conducted a study to find out what teachers believe about performance appraisal: To determine what factors, if any, teachers considered critical to the success or failure of appraisal in New Zealand schools. The research techniques used were focus groups, semi-structured interviews and questionnaires. The participants were one hundred and nine teachers from three selected schools. The principal, senior managers and teachers were interviewed to ascertain their views on appraisal and associated implementation issues in their schools. Ten teachers participated in the in-depth focus group interview that lasted two hours. The questionnaire was developed to investigate whether there was a correlation between the views of principals and senior managers and the views of classroom teachers in schools. The research concluded that the teachers recognised the need for a system of performance appraisal that was linked with professional development. These findings concluded that for performance appraisal to be effective there should be a strong link with accountability and professional development (Fitzgerald, Young and Grootenboer 2003).

Studies conducted in this section involve Group interviews and semi-structured in-depth interviews similar to those that I am going to use in my study. The research is conducted on teachers who are in management. My study is on teachers who are in management although research conducted by Thomas and Siskin in Carnoy, Elmore and Siskin (2003) is a case study the sampling being six high school principals the departmental heads and individual teachers and administrators. For the purpose of my study I will only concentrate on eight heads of departments. My study might also involve the appraisal of

educators since the heads of departments are part of the appraisal team as immediate supervisors of educators.

2.5.7 Accreditation and Universalisation

2.5.7.1 Accreditation

The shift from Apartheid education to democratic education in South Africa coerced South African education to offer the citizens the status of being ‘global citizenship’. I have previously discussed the concept of ‘global citizenship’.

2.5.7.2 Universalisation

Universalisation is also linked to ‘life-long learning’ and global citizenship. The hallmarks of universalisation are standardisation of testing, measurable performance standards and universal qualifications; to qualify citizens to compete in the world of work globally. In South Africa the universalisation compelled educators to affiliate to the South African Council for Educators (SACE). After 1994 South Africa experienced ‘brain drainage’. The term ‘brain drainage’ refers to the educated people who leave South Africa seeking employment in other countries. The South African Education Department is experiencing a shortage of teachers; one of the reasons might be aligned to globalisation. These reforms are characterised by efforts to create measurable performance standards through extensive standardised testing and the introduction of new expectation of better performance at low cost (e.g. universalisation of textbooks).

2.6 Examination of Legislation and Policy in South African Education

In this section I have chosen Quality Assurance and Personal Administration Measures (PAM) as policies that are directly affecting the SMT. One of the crucial roles of the

SMT is the performance appraisal of educators. The performance appraisal of educators is Integrated Quality Management System (IQMS). The PAM document states that the HODs participate in IQMS in order to regularly review the professional practice of educators with an aim of improving teaching and learning and management. IQMS is a way of monitoring the performance of educators. Integrated Quality Management (IQMS) and the Whole School Evaluation are both part of Quality Assurance.

The Whole School Evaluation (DoE, 2000) is a school programme that purports efficiency and accountability as part of Quality Assurance (Umalusi). The aim of Quality Assurance is to ensure that providers of education and training have qualifications and learning programmes that ensure that education conforms to set standards. The Whole School Evaluation (WSE) states that:

With the democratisation of education and the associated decentralisation of authority, schools are increasingly being held accountable for their performance. This implies that school improvement is the responsibility of schools as much as it is of the national and provincial departments of education. In order to meet the demands for improved quality and standards, schools need to establish appropriate strategies for the monitoring and evaluation of their work (DoE, 2000, p.3).

This quote highlights that Quality Assurance is part of the government's monitoring system that monitors efficiency and shifting accountability to individual schools. The monitoring system is the result of decentralisation. The SMT is responsible for Quality Assurance in schools. The Quality Assurance is related to new Managerialism principles. The Quality Assurance has been designed by the department of education to monitor schools. Surveillance is the driving force of Quality Assurance. Surveillance is adding responsibility to the management of the school. The motive behind surveillance is cost effectiveness. The question could be asked: For whose benefit is this cost effectiveness? An answer to this would be the government. To tease the argument further would be to critically analyse the schools that could be advantaged and disadvantaged by this programme.

2.7 Conclusion

According to studies conducted there is evidence of the impact of globalisation on education and the work of educators in management. The aim of my research is to investigate the changing roles and responsibilities of educators in middle management in the context of education reform in secondary schools.

Most of the readings I have reviewed are associated with critical theory, critical social theory and critical pedagogy. Although these theories might sound different, they all fall under critical theory disciplines. These theories argue against the link of education to economy. All critical theories claim that education is political and it can produce inequality in society. The aim of critical theory is to transform the society for a socially just world. My study is located within the critical paradigm and it is also informed by critical theory.

CHAPTER 3

RESEARCH METHODOLOGY

3.1 Introduction

In this chapter I have presented and explained the methodological approach I have used in generating and analysing data. I have presented data collection techniques, procedures followed and have provided the rationale for the choices I have made.

3.2 Research Paradigm: Critical Theory and Critical Education Research

My study can be considered to be located within the critical paradigm. Cohen, Manion and Morrison (2007) regard the critical paradigm as a developing approach to educational research (Cohen, Manion and Morrison, 2007, p. 26). To Cohen, Manion and Morrison (2007), the new, critical paradigm, detects shortcomings in positivist and interpretive paradigms that are perceived to be concentrating on technical and hermeneutic knowledge respectively leaving out the social and political hermeneutics of knowledge (Cohen, Manion and Morrison, 2007). The critical paradigm interrogates power relations and aims to uncover the underlying forces that shape the dynamics of educational institutions (ibid).

Ward (2006) describes Critical Education Theory as embodied by Critical Theory. Critical Theory is associated with Habermas and the Frankfurt school. The roots of Critical Theory could be traced back to Marx and Hegel's central argument that society needs to aspire to a democratic society (Cohen, Manion and Morrison, 2007). Ward (2006) argues that Critical Theory was developed in Germany in the 1930s as a socio-political theory that responded to the challenges of Fascism (a belief that claims that centralised government is ideal). It was developed to give an explanation of the failure of

Marxism to bring about social revolution (Ward, 2006). The main approach of critical theory is therefore ideology critique (Cohen, Manion and Morrison, 2007; Ward, 2006). Ward (2006, p. 7) also argues that the public belief in 'human nature' views power and hegemony as an inevitable and irresistible human reality. This public belief is criticised for maintaining existing power relations that opposes social change. The notion of 'human nature' as hegemony justifies the inequalities in the society through the process where the disempowered are persuaded to participate in their own disempowerment. The aim of critical theory is to transform society into a better world where domination and oppression is challenged by this notion of 'human nature' (Ward, 2006).

Lakowski (1997) argues that critical theory claims that education is political and it aims at reproducing inequality in our society. Therefore critical educational research aims at transformation that will benefit the oppressed and marginalized in our society. The aim of critical research is to expose and challenge inequality and injustice towards creating a more just, equal and democratic society (Scott and Usher, 1996; Cohen, Manion and Morrison, 2007). Critical theory aims at promoting critical awareness and consciousness; breaking down the institutional hierarchy and ideologies that propagate and reproduce social inequalities in our society (Henning, 2004). Scott and Usher (1996) argue that the aim of critical social research is not only to conscientise or raise awareness, particularly of oppressed people, but to aim at taking action against any hegemonic practices for the transformation of society into equality and democracy (Scott and Usher, 1996; Cohen, Manion and Morrison (2007).

Lakowski (1997), Bates, Forester and Giroux cited in Keeves (1997) contend that schools ought to be studied in all their interactional complexities through critical reflections. Critical Theory interrogates how hegemony in education is enforced using a social control mechanism in the form of the curriculum, the hidden curriculum, hierarchy, individualism and competition (Ward, 2006).

Henning (2004) argues that Critical theorists question the political nature of power relationship with the world. Critical theories argue that events are understood within social, political and economic contexts.

The critical approach is appropriate for the analysis of teachers' workplaces because it incorporates the relations of teachers arising within a capitalist patriarchal ideology (Robertson, 2000). Considering what the literature has highlighted about critical theory; critical theory has been appropriate to analyse how educational reform has affected the professional lives and work of educators in middle management in secondary schools. It also aims to investigate how these education reforms are linked to globalisation through an analysis of the experiences of middle managers in the current context of school reform and globalisation. For the purpose of this study some key elements of critical theory have been employed to enhance the research process.

The aim of critical theory is 'social justice' (Griffiths, 1998, p.179). Griffiths (1998) states that the term social justice has a 'long history in philosophy and politics'. It is hoped that the methodological approach used and the methods adopted, namely, focus group and semi-structured interviews will provide educators with an opportunity of engaging and reflecting critically on the current education reform context in South Africa and their experiences thereof. Cohen, Manion and Morrison (2007, p.28-29) legitimise the usage of critical theory in education by following four stages of ideology critique through reflective practice. They both agree that in stage one there should be a description and interpretation of the existing situation. The second stage is about getting more information about how the existing situation has taken its form. The third stage is about the confrontation and challenging of the existing situation with an aim of changing the situation. The last stage is about the reconstruction and the evaluation of the achievement of the situation in practice.

Habermas' (1972) and Smyth's (1989) stages of ideology critique as cited in Cohen, Manion and Morrison (2007) illuminate the relevance of critical theory in my study because my study focuses on getting information from educators about how the

educational reform has affected their work and professional lives as both educators and managers. The aim of my study was to probe the HODs to describe their situation that forms the bases for at least the first two stages. The accomplishment of the first stage could lead to other stages where the HODs would be able to critically analyse and understand reasons that brought about the existing situation in their workplace; which could eventually raise awareness to educators that might lead to the agenda for altering the situation (confrontation-resisting to collude with the status quo).

The educators were able to interpret their existing situation in their schools as managers by articulating their own understanding of their situation through the semi-structured individual interviews and the focus group interview. It was also the intention that the study would provide the HODs with a voice to articulate their experiences of educational reform and through engagement in the focus group interview, examine their perceptions of what has brought about the existing situation in their workplace and challenge it.

I have considered that critical theory has its shortcomings. Scott and Usher (1996) highlight that a major problem of critical theory is that it has its self-proclaimed commitment to emancipation, which might be seen as applicable to all situations, yet it is impossible. Scott and Usher (1996) continue to argue that universalising emancipatory discourses may not always have the effect intended. They also highlighting that the emancipation of people should not be oversimplified since people are unique and have diverse ways of thinking, therefore they have their own way of interpreting things.

The critiques of critical theory have been mentioned in order to highlight the complexities of using critical theory in research. My study is not making any claims that this study will lead to emancipation, but the aim of my study is to investigate educators' experiences of education reform in the current context of globalisation. In this regard, my research aims at producing knowledge that aims to show the influence of globalisation on education reform using globalisation theories and concepts as analytical tools.

3.3 Research Design

This research study is a qualitative research study. In qualitative research, the researcher focuses on the in-depth descriptions of a phenomenon being studied. Qualitative research aims at understanding people's perceptions. Denzin and Lincoln (2006, p.3) argue that 'qualitative researchers study things in their natural settings, attempting to make sense of, or interpret, phenomena in terms of the meanings people bring to them'. Qualitative research provides rich details about complexity of social life (Neuman, 2000). Babbie (2002) argues that qualitative data analysis involves interconnectedness between theory and analysis. Babbie (2002) further explains that qualitative data analysis aims at discovering patterns that emerge in the text. Babbie (2002) offers two approaches to cross-case analysis; variable oriented analysis and case oriented analyses (Babbie, 2002, p.370).

Qualitative research has been appropriate in this study because it aims at uncovering meanings people have about a particular phenomenon (Merriam, et al., 2002). This study aims at investigating the perception of educators in middle management positions, on how education reforms associated with globalisation impacts on their roles and responsibilities. The in-depth understanding in the context refers to deep understanding of how HODs feel about curriculum reforms in their schools. A Qualitative approach has been appropriate in this study, based on Merriam, et al.'s (2002) argument that meanings, understanding and processes could be best researched using a qualitative approach. Qualitative research analyses data by categorising it into concepts, themes or patterns. Eventually, concepts may be categorised to form sub-themes that lead to the formation of the main themes.

Qualitative research uses qualitative methods that involve textual or verbal data (Cohen, Manion and Morrison, 2007). I have therefore used in-depth semi-structured interviews and a focus group as qualitative data collection techniques.

3.4 Methodology

3.4.1 Case Study

My study is a case study. The definition of case study is complex than what I have explained. Case studies are bound by their methodology. A case study is defined as detailed information about a particular participant (one participant) or a small group; looking intensely at an individual or small group; drawing conclusions from only that particular participant or small group without generalising results (Homell, et al., 2005). A case study tries to capture the participants' perceptions and thoughts about a particular phenomenon or situation in that specific context (Cohen, Manion and Morrison, 2007). Henning (2004, 32) argues that the main assumption in the case study is that the phenomenon is investigated as a 'bounded system'. This means a case study 'focuses on specific people, engaged in specific activities, at a specific place and at a specific time' (Henning, 2004, p.32; Cohen, Manion and Morrison, 2007, p.235). My study is therefore considered to be a case study because it has focused on HODs (specific people) carrying out their work (specific activity) in selected secondary schools (specific place); in the current context of post-apartheid education reform in South Africa (time). The participants had their own unique context. Cohen, Manion and Morrison (2007) describe case study as a study of real people in a real context or situation.

3.5 Strengths and Weaknesses of Case Studies

3.5.1 Strengths

Although case study results cannot be generalized, they can allow the generalisation about an instance if a participant or participants have been selected to represent a diverse cross section of the community (Homell, et al., 2005). This study is part of an international research project as a collection of single cases; it will be become possible to identify patterns and recurring themes.

Case studies are highly effective in making the researcher 'understand cause and effect of participants in their real context'; and further allow the researcher to 'investigate and report complex dynamics and unfolding interactions of events, human relationships and other factors in a unique instance' (Cohen, Manion and Morrison, 2007, p.253).

Therefore case studies are perceived as strong in reality since they consider the context of research. Cohen, Manion and Morrison (2007) suggest that case studies 'focus on individuals and groups of actors, and seek to understand their perceptions of events'. My study has focussed on HODs as a group.

Homell, et al. (2005) suggests different types of case studies and my study could be considered a Critical Instance Case Study. This type of case study examines a situation with little or no interest in generalising the findings (ibid.). According to Homell, et al. (2005) the Critical Instance Case Study answers the cause and effect questions. Cohen, Manion and Morrison (2007) regard case studies as good for educational research. They present the advantages of using case studies as they consider the context of the participants; offer rich description (focus more on the subjects under study, investigate their educational background, emotional background, perceptions of themselves and their surroundings, their likes, dislikes, and so on) and support alternative interpretations; allow the readers to evaluate the study themselves, and case studies are good for any action to be taken e.g. policy making or transformation (Cohen, Manion and Morrison, 2007 p.256).

3.5.2 Weaknesses

The weaknesses of case studies are that they are often criticized as being too subjective. Case studies are often regarded as having deviated from other academic disciplines since the case study uses fewer subjects relying on one or a few subjects as a basis for cognitive extrapolations running a risk of inferring too much from what might be circumstance; providing insufficient precision (that is, quantification), objectivity and rigor (Yin 1989 quoted by Homell, et al., 2005). The approach relies on personal interpretation of data

and inferences that can be influenced by the researchers' bias (Cohen, Manion and Morrison, 2007; Homell, et al. (2005). Results may not be generalised because they are context bound. Homell, et al., (2005) argues that it is difficult to test validity in case studies because they are context bound, and they rarely offer a problem-solving prescription.

The case study approach has been relevant to my study because my study has explored the effects of educational reforms on the work and professional lives of HODs. The case study approach has allowed me, as a researcher, to be free to discover and address unique issues as they arise in my study.

3.6 Validity and Reliability

The issue of validity and reliability are of utmost importance to the researchers using a case study approach. Homell, et al. (2005) stressed the importance of validity and reliability in case studies by highlighting that case study researchers need to ensure that their interpretation of data is both valid and reliable since the case study results are based on their unique context. Reliability is defined by Golafshani (2003) as a concept used for testing and the evaluation of both qualitative and quantitative methods of research. Research needs to be examined to see whether it is 'trustworthy' or not (Golafshani (2003, p. 601). It becomes more important when considering that the case study researchers need to ensure that their interpretation of data is both valid and reliable.

Validity and reliability are inseparable in research. Merriam, et al. (2002, p.27) highlight that 'there is no point in considering reliability without validity'. Merriam et al (2002) argues that even if the instrument is considered accurate that does not necessarily mean that the results are justified. Therefore validity and reliability should go hand-in-hand; since they both measure the authenticity of the research project as a whole.

What is validity? Validity on one hand is a way of judging whether research has been trustworthy (Homell et al., 2005) and reliability on the other hand is defined by

Theodorson and Theodorson (1969, p. 344) as a test of measurement ‘whether a measuring instrument is accurately measuring whatever it is measuring’. The argument being the same results would be produced when the same instrument is used. Validity is important in research because it validates the accuracy of procedures followed during the research process and findings. Validity is the crux of the whole research process. Validity can be judged differently in qualitative and quantitative research styles (Homell, et al. 2005). Cohen, Manion and Morrison, (2007) argue that there are different kinds of validity. They claim that there are four types of validity: internal validity, external validity, content validity and construct validity.

The external validity refers to the degree to which the results could be generalised. My research results are not going to be generalised since I have alluded to the fact that case studies results should not be generalised. This study has used the internal validity. The internal validity measures how accurate the research was. In this study I have addressed the issue of validity and reliability by considering internal validity as suggested by Homell, et al. (2005). The first step was to consider the rigor with which the study was conducted. This means as a researcher I had to look for a specific phenomenon presenting it as trustworthy and believable. I had to follow all the steps suggested for case studies. For example the selection of participants (I selected eight HODs); data collection techniques (the in-depth individual semi-structured interviews and one focus group interview) and data analysis (Data in the case studies could be analysed using a holistic approach or coding approach. Data in this study has been analysed using a coding approach). The second step was to consider that the case study results are based on the context of the research, since case studies research results cannot be replicated and get the same results, due to its context bounded ness. Context boundedness in this case means that the results of the research are inseparably connected with the context of participants in that particular research. I am going to elaborate more on coding in data analysis process.

Merriam, et al (2002) argues that triangulation is part of internal validity. What is triangulation? Triangulation is complex. In this study I have used data collection as

triangulation as defined by Henning (2004 p.103). Cohen and Manion (1994) concur with Henning (2004) in their description of triangulation as a way of looking at something coming from various angles. Golafshani (2003) describes triangulation an important methodological issue in naturalistic and qualitative approaches to evaluate and control bias. Merriam, et al. (2002) argues that triangulation is a way of comparing whether data collected from different sources confirms or contradicts each other. In this research study I have collected data through in-depth interviews and focus group discussions as a way of validating my research. Cohen and Manion (1994) recommend triangulation for both qualitative and quantitative research.

The advantages of triangulation in social research are that it gives the researcher confidence when corresponding results are obtained. It overcomes the problem ‘method-boundedness’ (Henning, 2004, p.103). They highlight that methodological triangulation is more often used compared to other types of triangulation. They quote instances where triangulation could be used, for example, in complex phenomena, in controversial studies where controversial aspects of education need to be evaluated more freely, and in case studies (Cohen and Manion, 1994). Cohen and Manion (1994) state that the main problem confronting researchers using triangulation is that of validity. These authors highlight that researchers have a problem in answering which method are to be selected. How they are to be combined? How data could be used? They mention that it is difficult to answer these questions (Cohen and Manion, 1994, p.242).

The understanding about strengths and weaknesses of case studies made me, as a researcher, aware of my bias. I therefore used the focus group interview as part of triangulation. In this study a focus group was used as the validation of data collected through in-depth individual semi-structured interviews. The in-depth individual semi-structured interviews and the focus group interview had the same questions that were phrased differently. The response of participants collected through semi-structured interviews was discussed in the focus group interview to validate whether the individual responses correlate with the group response to crucial points that have been raised in the in-depth individual interviews.

The usage of a case study approach necessitated me to be critical on the issue of validity and reliability. Homell, et al. (2005) stresses the importance of validity and reliability in case studies by highlighting that those researchers using case studies need to ensure that their interpretation of data is both valid and reliable since the case study results are based on its unique context. Reliability is defined by Golafshani (2003) as a concept used for testing and the evaluation of both qualitative and quantitative methods of research. Research needs to examine whether it is trustworthy or not (Golafshani (2003, p. 601). It becomes more important when considering that the case study researchers need to ensure that their interpretation of data is both valid and reliable.

3.7 Research Methods

The key question has been investigated through the following qualitative methods: focus group interviews and in-depth semi-structured interviews.

3.7.1 The In-Depth Semi-Structured Interviews

The semi-structured interviews were conducted as the first method of data collection. All eight HODs were interviewed. The interview process was conducted in schools where the participants were teaching. The participants chose a place where we were not going to be disturbed. I started by explaining the whole process to the respondent. The use of semi-structured interview allowed the participants to share their experiences, perceptions and feelings in respect of education reforms and the effects on their professional lives and work. The semi-structured interview gave me an opportunity to ask open-and closed questions. Henning (2004) describes an interview as a communicative event where I had face-to-face discussions with respondents (Henning 2004). The communication event gave me an opportunity to get deeper insight into the participants' personal experiences about educational reforms and allowed me to use probes for clarity and further explanation as suggested (Morgan (1998). The participants did not experience problems in responding to question because most of the questions were about the perception of

their roles and responsibilities. Another advantage was that I was familiar with educational terms.

Henning (2004) highlights that interviews are time consuming, resource intensive, and cannot be done with many people because they need to be transcribed. I interviewed eight participants and taped the interviews. The tapes had to be transcribed.

Interviews are suitable for the qualitative research methods because they describe the meaning and the experience of interviewees (Cohen, Manion and Morrison 2007; Bailey, 1982). Henning (2004) gives the novice researchers a word of caution: that the common usage of interviews by researchers does not necessarily mean that it is an easy method, but there are advantages and disadvantages of using interviews in research. The advantages of interviews are that they are accurate but time consuming (Bailey, 1982). Interviews could help the interviewer to get in-depth information about the interviewee on a particular subject if used as a follow-up response. It is advisable that the interviewees need to have a good understanding of the topic under study. The interviewers are cautioned about bias results when conducting interviews. The bias could jeopardise results. I have considered the above-mentioned concerns about interviews by choosing participants who are knowledgeable about management; managing maths and science in secondary schools. There are significant issues to be considered when using interviews as a method of data collection.

Gina (2007) gives two types of interviews, the structured interviews and unstructured interviews. In the former the researcher uses a set of questions (interview schedule) in a certain order, which need to be adhered to. Structured interviews may require closed-ended structured responses or open-ended unstructured response (ibid). My research project opted for semi-structured individual interviews. The rationale for opting for semi-structured interviews was that they allow the researcher to use probes and prompts for clarity and explanation. In this study I wanted the participants to relate their narratives guided by my questions. I wanted the respondents to respond to my questions and be able to probe them where necessary. The semi-structured interviews allowed me to do that. I

introduced the question and expected the respondents to ask questions for clarity and talk freely about the topic. The type of research necessitates the type of interview to be considered. The semi-structured interviews helped me to get an in-depth understanding of the participants, their perceptions of their roles and responsibilities shaped by the educational changes. I wanted all the participants to respond to questions that had been set. Although the respondents were the only people expected to talk, the conversation was a two-way because of the type of interview I was conducting. (I have included a copy of the semi-structured interview schedule in the appendixes.)

3.7.2 Focus Group Interviews

A focus group interview was used as a second method of data collection. The focus group interview was used to generate discussion around the issues that were raised in the semi-structured interviews as way of validating what had been said in the semi-structured interviews. I organised one focus group session. The focus group was conducted with the participants who were interviewed. The questions that were asked in the semi-structured interviews were phrased differently but they needed information related to HODs managing mathematics and science in secondary schools.

The choice of focus group interviews as one of my research methods is partly based on Morgan's (1998) argument that focus group discussions are effective in generating a rich understanding of participants' experiences and beliefs. He claims that focus groups are also suitable as a qualitative research method because they share three fundamental strengths of qualitative methods (1) exploration and discovery (2) context and depth, and (3) interpretation (Morgan, 1998, p.12). Morgan (1998) defines a focus group as a group discussion exploring a certain issue. The focus group helped me to get behind people's thoughts, opinions, wishes, concerns and experiences; therefore seeking people's interpretation of things and events (Morgan 1998). Morgan goes on to distinguish focus groups from group interviews. To him the latter emphasises the separate responses of individuals, referred to as 'serial interviews' whereas the former concentrate on group responses (Morgan, 1998, p.35). This study used one focus group interview. Morgan has

covered a wide range of practical tasks that a novice researcher could use when planning focus group, timeline, budget, group composition, recruitment of participants and setting up sessions.

The ideal number of participants in the focus group is 6-12 but Morgan suggests 6-10 participants (Morgan, 1998, p.71). The rationale behind the fewer numbers in the focus group is that all participants should have a chance to speak about their personal stories and express their heartfelt opinions about issues being discussed (Morgan (1998).

Morgan (1998) appraises fewer participants in research because a novice researcher gets a chance of paying attention to each participant in the focus group. Another advantage of having a small group is that participants get to know each other quicker and better therefore making the discussion lively and effective. My study used four participants in order to generate lively and effective discussion. The small group of participants was an advantage because all the participants had a chance of being part of the discussion. I had a chance of probing all the participants' responses to the questions asked and to encourage participation and engagement. My intention was to have a larger group that involved all the HODs who were interviewed to participate in the focus group discussion. Six participants responded to my invitation. The number of participants who responded positively to the invitation granted me an opportunity of setting a date for the focus group, but unfortunately, only four participants came for the focus group discussion. Fortunately, the HODs who participated represented the demographics of schools prior to 1994. My focus group therefore consisted of four HODs from each of the former Departments of Education to represent the demographics of schools prior to 1994. One participant was from the former House of Delegates (HOR); one from the former Department of Education and Training (DET); one from the former Department of Education and Culture (DEC) and one from a previous Model C school.

Morgan (1994) suggested that it is a risk to rely on one method of data collection. I therefore used focus group interview partly as a means of triangulation. In this study a focus group was used as the validation of data collected through in-depth individual semi-structured interviews. The in-depth individual semi-structured interview and focus group

interview had the same questions that were phrased differently. The response of participants collected through semi-structured interviews was discussed in the focus group interview to validate whether the individual responses correlated with the group response to crucial points that had been raised in the in-depth individual interviews.

Who should participate in focus group? The answer to this question depends on the study being conducted. Morgan (1998, p.56) states that most focus groups rely on purposive samples as part of qualitative research methods. It is important to have a group that is homogeneous. The participants are selected because of their special knowledge about an issue under study. My study has focused on HODs managing maths and science as a homogeneous group (the participants were managing the same subjects: maths and science).

Cohen, Manion and Morrison (2007) state that semi-structured interviews and focus group interviews need to use prompts and probes in order to clarify terms, questions and topics to the respondent. Probes and prompts enable the interviewer to ask the respondent to elaborate on the topic to keep the discussions going.

The focus group was set up at the University of KwaZulu-Natal. My role was to facilitate the discussion. My supervisors supported me in the focus group interview. One of them video recorded the focus group interview with the permission of the participants, while the other was an observer. My role as a facilitator was to ask questions, use probes and prompts to get the discussion going; and clarify questions where applicable. (I have included a copy of the focus group interview schedule Appendix F.)

According to the literature I have reviewed, focus groups and semi structured interviews have been relevant to my study and have served the purpose for which they have been used. These research techniques are suitable for qualitative research. The in-depth individual interviews were followed by a focus group interview where participants were able to discuss crucial points that had been raised in the in-depth individual interviews.

The focus group interview has been used to validate the individual responses to certain critical issues (Kerlinger, 1970).

3.7.3 Data Analysis Process

Thematic analysis has been used in analysing data in this research project as an appropriate method because of Braun and Clarke's (2006) argument that thematic analysis offers an accessible and theoretically flexible approach to analyse qualitative data. Thematic analysis is defined as a method used in identifying, analysing and reporting patterns within the data in rich detail (ibid. 79). Braun and Clarke (2006, p.82) define a theme as 'something to capture important data in relation to the research question or questions and represents some level of patterned response or meaning within the data'.

Why has it been important for this research project to use thematic analysis? The response to this question could be best understood by considering Braun and Clarke's (2006) argument about thematic analysis in research. Braun and Clarke (2006) recommend the use of thematic analysis since it allows the researcher to determine themes in a number of ways. Themes or patterns in thematic analysis could be identified through inductive and deductive ways (Braun and Clarke 2006). What is a deductive and an inductive approach? Braun and Clarke (2006) state that a researcher using a deductive approach starts with a theory in mind and then collects data to test or confirm the hypothesis. Positivists in proving an hypothesis drawn on an experiment mainly use the deductive approach. My research has used the latter, an inductive analysis. An 'inductive analysis is a process of coding data without trying to fit it into a pre-existing coding frame' (Braun and Clarke, 2006, p.79). I have generated themes from what the participants have said and I have moved to the interpretation of themes.

This study has followed four steps in Braun and Clarke's (2006) thematic analysis. In the first step I familiarized myself with data. I had to listen to the tapes twice before the transcription of data from the tapes to the textual form. Henning (2004), Braun and

Clarke (2006) highlight that the researcher needs to familiarise themselves with data in order to be competent in labelling units of meaning. Henning (2004) goes on suggesting that the novice researchers should be responsible for their own transcripts in order to familiarise themselves with data. I therefore followed Henning's (2004) suggestion by transcribing data from the tapes to the textual form. The transcription was exhausting and time consuming, but I had to be patient since I had been warned that transcription is an initial stage of data analysis (Denzin and Lincoln, 2006). I had to read and re-read the transcripts checking for mistakes in the transcripts before coding it.

When I was certain that I was familiar with raw data, I then started coding the data. Homell, et al. (2005) argues that data in the case study could be interpreted into two broad ways: holistically and through coding. The holistic analysis does not break data into chunks but draws conclusions on the text as a whole. I have analysed data in this study through coding. I coded all the data across the data set to generated initial codes. Braun and Clarke (2006) emphasize the importance of coding all the data even if that data is not related to the research question. They argue that coding all the data is advantageous because a researcher might not know whether that information might be interesting later or not (Braun and Clarke 2006).

Focus Group Interview	CODES	CATEGORIES	THEMES
<p>T1 For me the most significant changes is the... the one that involves all races coming to the same school. It has been a positive change and another change is bringing the FET instead of 550Nated system and will know there is positive change after the matrices 2005 have written their exams but to me they are quite significant changes</p>	<p>Integration of Education Departments</p>	<p>Positive about curriculum changes</p>	<p>New curriculum</p>
<p>T2 About teaching and learning styles, the presentation that is done by the educator compared to the current one where the learners are also actively involved in learning inside the classroom as well as outside the classroom they are more active and the teacher help them here and there so I think those are the most significant changes.</p>	<p>The new teaching styles make learners active</p>	<p>Positive about curriculum changes</p>	<p>New curriculum</p>

<p>T3 Ya, I can also say that the significant change has been the management changes in terms of authoritarian type of leadership to democratic type of leadership which has passed on even to learners where teachers have not to be so authoritarian when dealing with them. Like the abolishing or corporal punishment that was enforced to learners where learners now do not have to submit but are there to be taken as thinking beings. I believe that has been a significant change.</p> <p>T4 I think one of the significant changes that I have noted from past, apartheid era coming to fullness is that our learners have become more... There is democracy within the talk there is more freedom. I think it has created more of a problem as I see it as they have become very docile. Our learners are not as aggressive in their thinking or aggressive in the way they talk out as we used to be and they are not politicised any more as the previous generation.. I have to galvanize our learners when they have problem to come out and speak and sometimes fight for their rights, go to the management and speak about certain issue. The learners are not doing that anymore. They are sitting back comfortably, the country has changed, everything is hunky dory now. They are not becoming more forceful in trying to get what they want as the previous generation had been in forcefully fighting for their rights and being more concerned with social issues around the community, getting more involved in issues. Instead they are now more concerned with recreation -it's TV, TV games -- and not being involved in the community and that's the sad part. The good part is that in terms of our curriculum that has been introduced, the learners are now forced to go out and get job experience which is a good thing that would help the country.</p>	<p>Education demands Democratic leadership and management e.g. the abolishing of corporal punishment and learner autonomy. Autonomy of learners recognised</p> <p>Learner autonomy and freedom is perceived as problematic</p>	<p>Positive about curriculum changes that demands democratic leadership and management</p>	<p>Leadership and management</p>
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Table 1 – Data Coding

Coding helped me to retrieve relevant information (Neuman, 2000). Neuman quotes Strauss (1987, p. 55) who cautions the novice researchers by stating that ‘coding is the most difficult operations for inexperienced researchers to understand and to master’. Neuman (2000) suggests three kinds of qualitative data coding: open coding, axial coding and selective coding. Open coding is used to look for topics as articulated by the research questions. Open coding ‘bring themes to the surface’ (Neuman, 2000, p.422). I therefore opted for open coding looking for topics that were illuminated by a research question. The open coding allowed me to look for patterns in the data (Neuman, (2000).

I therefore moved to the second phase in Braun and Clarke (2006). The open coding allowed the potential themes to emerge from the data thematic analysis. The type of coding in this stage is axial coding (Neuman, 2000). The codes that were generated during the open coding were classified into categories. This stage was time consuming and frustrating because the clustering of categories kept on changing. I had to continuously check the categories, the codes and the raw data. The process of moving back and forth took a long time. I had to look for linkages in the concepts that have emerged from the data. I had to collect evidence from the data to validate the categories.

I then moved to the third phase of thematic analysis called selective coding (Neuman (2000) I combined phases three, four and five because at this stage I was focussing on themes. I had to search for themes, review them and then define the themes making them broader to accommodate all the themes. The themes had to be validated by the empirical evidence (Neuman, 2000). Braun and Clarke (2006) suggest that this phase should sort different codes into potential themes. The potential themes were formed by data that is sufficient to support them as themes I therefore moved beyond the themes looking for underlying assumptions about the themes. The themes and sub-themes in this research project were analysed using inductive analysis. The identification of main themes was frustrating and difficult. The last I did after a lot of frustration was to decide on making my themes broad to accommodate other potential themes.

3.8 Context, Site and Sampling

3.8.1 Research Site

The research site for this study was secondary schools in Pietermaritzburg. Schools were selected to represent the racial, social, gender, economic and linguistic diversity of the province. My research aimed at investigating the impact of globalisation through educational reforms on educators serving in middle managers in secondary schools. The secondary schools have been targeted for the purpose of this research project because

they include the senior primary phase (Grades 7-9) as well as the Further Education and Training phase (FET) Grades 10-12. These phases have been targeted due to numerous curriculum transformations taking place in these phases.

The HODs have been chosen as participants in this research project because they are implementers of curriculum in schools. The HODs perceptions of educational reforms are the core issues that have been researched in this study.

3.8.2 Sampling

Bailey (1982) suggests two types of sampling methods: the probability and non-probability sampling. In the former the selection of participants is known; but the selection of participants in the latter is not known. The sample in non-probability sampling does not represent the larger population. Therefore the findings in non-probability sampling cannot be generalized (Bailey, 1982). Consequently my research findings will not represent a wider population.

Case study as an approach is suitable for non-probability sample. The rationale of opting for purposive sampling has been justified by an understanding of non-probability sampling in that it is appropriate in qualitative research that deals with small samples. This study is going to focus on only eight HODs. The role of the researcher is very crucial in the qualitative study. One of these roles is the choice of sample depending on the aims of the study. My study aims at exploring the impact of globalisation on the work of educators who are serving in management positions in the secondary schools in KwaZulu-Natal, Pietermaritzburg. Therefore my research is targeting a certain group. In such a case purposive sampling is appropriate.

Research using purposive sampling calls for the researcher to choose participants who have been identified as suitable and possess particular characteristics needed for the research (Cohen, Manion and Morrison, 2007, p.115). My research sample is eight HODs as a group of secondary school leaders. This group has been chosen for a specific

purpose: to explore the impact of globalisation through education reform. The sample has been chosen to represent people who are 'knowledgeable' (Cohen, Manion and Morrison, 2007, p.115) about education reform before and after 1994. Ball (1990) cited in Cohen, Manion and Morrison, (2007, p.115) highlights that 'the sample could be chosen by virtue of their expertise or experience'. As a researcher I assume that this group has experienced educational reform and the HODs are perceived to be in a position, therefore, to describe how these education reforms have affected their work as educators in middle management positions. Purposive sampling allows the researcher to choose participants to suit the research under study. I have targeted mathematics and science HODs in secondary schools.

The participants who were selected represented the racial, political, social, gender, economic and linguistic diversity of the province. The choice of sampling was used to detect whether different racial, political, social, gender, economic and linguistic diversity have any significant effects on the participants' experiences. The schools that participated were ex-DET schools (Black rural schools), ex-DEC schools (Black township schools), ex-HOD (Indian schools), ex-HOR (Coloured schools) schools and Model C schools (White schools). The ages of participants ranged from 30 to 50 years. The teaching experience ranged from 13 to 28 years. Gender: two women and six men. The racial representation of participants, according to South African categorisation was 3 Africans; 2 Whites; 2 Indians and 1 Coloured. All the participants were Mathematics and Science HODs.

The following table presents information about participants who participated in the research study. I have given the schools fictitious names and used pseudonyms for HODs to keep the anonymity and confidentiality as promised to the participants.

Name of HOD	S. S. Popman	D. E. Faku	J. E. Xulu	N. N. Z. Yankee	W. O. Khoza	S. D. T. Naidoo	B. Z. Booii	T. Y Gates
Name of school	Skhona High school	E. H. Hope High school	St. Glass High school	Hlophe High school	White Brick High school	Stoneridge High school	Khulile High school	Rhoda High school
Type of school	Model C	Former D.E.C	Former D.E.T	Former H.O.D	Former D.E.T	Former H.O.D	Model C	Former H.O.R
Race	White	African	African	Indian	African	Indian	White	Coloured
Gender	Female	Male	Female	Male	Male	Male	Male	Male
Subject of Discipline for HOD	Maths and Additional Maths	Physical Science, Maths, Life Science, Bio, Technology	Mathematics, Physical Science, Biology, Natural science, Life Science,	Maths and Computers	Maths, Science	Mathematics, Physical Science, Biology, Natural Science, Life Sciences, Computer Study, Computer Literacy	Physical Science, Biology, Maths and Computer Studies	Mathematics, Physical Science, Biology, Natural Science
Years as HOD	9	6 months	1	3	2	8	5	17
Teaching Experience	23	17	17	24	9	22	23	27

Table 2 - Breakdown of Participants

I have targeted Mathematics and Science HODs since they are managing scarce subjects that are in high demand these days. I have mentioned in chapter 1 that the shift from apartheid education to democratic education demanded the state to redress the inequalities of the past. Kahn (2001) quotes President Mbeki's State of the Nation Address where he was stating the efforts of the state to turn the education system around to improve the nation's skills base. The President highlighted that the government has approved the Human Resource Development Strategy to accelerate skills development programme for areas that are critical to a more competitive economy. The subjects the President mentioned were science, mathematics and technology. The South African National Education Minister, Naledi Pandor, organised Dinaledi projects as campaigns to promote the teaching of maths and science in secondary schools that were previously disadvantaged by apartheid education. The President's address is linking maths, science and technology with global economic competitiveness. Therefore, the HODs managing these subjects are affected by the impact of globalisation

3.8.3 Ethical Considerations

Ethics is very important when doing research with people. The ethical considerations protect individuals who are research participants from being dehumanised and abused (Cohen and Manion, 2001). The protection and the rights of research participants are very crucial in research (Cohen and Manion, 2001). They present key ethical issues to be considered when conducting research. These key issues are: informed consent, voluntary participation, anonymity, privacy, confidentiality, access and acceptance. I have assured the participants that information divulged would be confidential. Consent of participants is very crucial in research. Considering what has been suggested by literature on ethical issues, I applied for ethical clearance from University of KwaZulu-Natal (UKZN) in the Ethics Department. My ethical clearance letter confirming that I have satisfied the research ethics required by the University can be found as Appendix A. Although the university ethics committee has granted me permission to conduct research, I did not embark on research without being granted permission by the Department of Education to conduct research in schools falling under its jurisdiction. A copy of the approval letter

can be found as Appendix B. Consent was also sought from the principals of schools where the participants have been working. A copy of the letter requesting consent can be found as Appendix C. The participants were informed about the research project (Cohen and Manion, 2001). This was a difficult process. I approached some of the schools and they refused to grant me permission to conduct research in their schools due to certain reasons. That did not impact negatively on my study because I was able to get good representation from different former Education Departments.

Although the principals of schools granted me permission to conduct research in schools, the participants signed informed consent to participate in the research project (Henning, 2004). I had to explain to the participants that participation was voluntary and that they have a right to withdraw at anytime. The signing of the consent forms did not mean that participants are forced to participate but meant that participants could withdraw at any time. A copy of the participant's consent form can be found as Appendix D. I have addressed the issue of anonymity by assuring participants that pseudonyms have been used instead of real names. The pseudonyms have guaranteed the confidentiality and anonymity of participants. I, as a researcher, had a responsibility of maintaining the anonymity and privacy of participants even if there could be some that are free to be exposed. The privacy of information will be guaranteed by locking the raw data in a safe for five years before destroying it. Any articles that are published as a result of this project will not reveal the identity of sites and participants in any way.

3.9 Conclusion

I conclude this chapter by highlighting that coherence in research is very crucial. The researcher needs to understand that reliability and validity in research as based on whether the researcher followed proper channels in conducting research. The proper channels in this sense means that the researcher has linked research to the paradigm; adopted an appropriate approach to the paradigm chosen; chosen an appropriate style suitable for the approach; chosen suitable methods or strategies for the style; chosen appropriate techniques for the method chosen and appropriate instruments used for data

collection. The coherence in the long list I have cited has validated the reliability of the research conducted.

CHAPTER 4

PRESENTATION OF FINDINGS

CHANGE IS GOOD BUT ...

4.1. Introduction

This chapter presents findings that have emerged from the qualitative data that has been collected through qualitative methods of a focus group discussion and semi-structured interviews. I have analysed data using thematic analysis.

I have organized the analysis of data by using one broad key research question.

4.2. The Key Research Question

How have education reforms affected the professional lives and work of educators in middle management positions, namely Heads of Departments (HODs) in scarce subjects in some secondary schools in KwaZulu-Natal?

This broad key question has been tackled by addressing the following key question:

- How do HODs perceive and understand educational reform in schooling?
- What is their perception of how these educational reforms have affected their professional lives and work as middle managers?

The broad key question was divided into sub-questions which focussed on how HODs understood education reforms in schools and whether they perceived these reforms as affecting their professional lives and work, namely their roles and responsibilities. It further sought to investigate HODs' feelings about educational changes and their understanding of international developments that might affect South African education reforms.

All tools used in data collection using a focus group interview and semi-structured interviews have been collated to provide a comprehensive response to the research question. This method is commended for enabling patterns, relationships, comparisons and qualification to cut across all data collected (Cohen, Manion and Morrison, 2007). The categories were formulated using the research questions. The research questions aimed at interrogating the participants' understanding of democracy, citizenship; curriculum reforms, implementation, administration and management.

Three major categories emerged from the data. These categories were Democracy and Citizenship (themes: governance, education policies; de-racialisation of schools, learner participation and unionisation) Curriculum Reforms and Implementation (themes: educator development, scarce subjects, learner assessment and learner/educator relationships) and Management/Administration (themes: changing roles and responsibilities; implementation of curriculum; educator appraisal; and personnel administration measurements). I have first started with Democracy and Citizenship as the theme that highlights the macro education policy changes in terms of a democratic education system that intended to promote democracy, social justice, equity, equality and redress in South African Education. I have then presented the findings on Curriculum Reforms and Implementation and then concluded the chapter with Management and Administration.

Categories of Themes

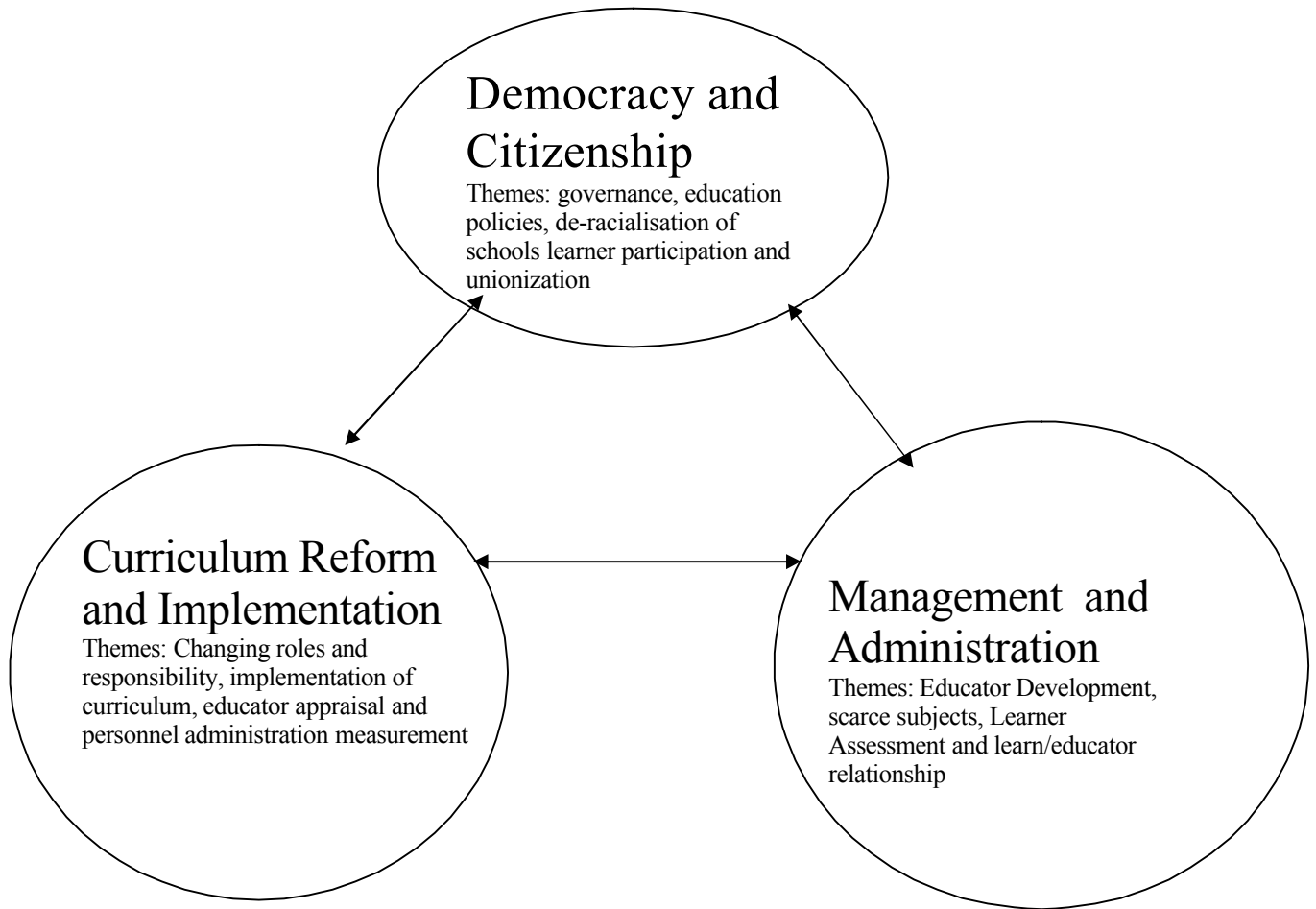


Figure 1 - The Themes That Were Illuminated By Data

4.3. Democracy and Citizenship

4.3.1. Introduction

In Chapter 1 I have briefly discussed democratic education and highlighted that this study aims at understanding how educators interpret and perceive education reforms and hence the shift from apartheid education to democratic education. It further highlights issues related to the role of the state in the democratisation of education; educators' perceptions of democratic education as a public good and the challenges they face in promoting democratic education. It also aimed at identifying what educators perceived as the key drivers of change and the impact of education reforms on the roles and responsibilities of educators in management positions in secondary schools. This chapter aims at presenting the key findings of this study.

South African Education after 1994 adopted a new democratic system that was underpinned by the following major constitutional values: Democracy, Equity and Citizenship. These three values became the major focus in the transformation of education. These constitutional values led to the introduction of a new curriculum. Consequently, the curriculum had to infuse constitutional values that included Human Rights in education. The aim of education had to focus on preparing learners to be global citizens. The concept of global citizenship emanated from the United Declaration of Human Rights (UDHR). The UDHR is an international law that mandates all citizens to be global citizens. The Constitutional values coerced the National Education Department to introduce a new curriculum system that would infuse the Constitutional values into education. The infusion of these values in education led to the introduction of democratic education system, and a new system of education – Outcomes Based Education (OBE). Outcomes based education aimed at transforming the education system from apartheid education to democratic education.

Data revealed that the HODs had diverse understanding about democracy and citizenship. Some of these understandings are going to be discussed later. The participants perceived democracy as the introduction of democratic education in schools, the integration of all education departments into one education department, the abolishment of corporal punishment, active participation of learners in education, democratic management of schools, abolishment of racial discrimination in education and inclusive education. Inclusive education policy is stipulated in White Paper 6 (DoE, 2001).

The democratic management and leadership of schools as cited in the South African School's Act (SASA) changes the management of schools from authoritarian to democratic management, and the introduction of new leadership styles. The democratic management and leadership of schools mandate the School Governing Bodies (SGBs) to participate in the management and leadership of schools. The National Education Act, 27 of 1996 guarantees the equity of all learners to access schooling without being discriminated against.

The adoption of democratic education in South African Education coerced the Education Department to introduce transformation policies that regulate all public schools according to democratic laws and regulations. Hence, I have started with governance as the key element in understanding democracy and citizenship in public schools.

4.3.2 Governance

Democracy and citizenship are new concepts in South African education. They were adopted when South Africa was declared a democratic country and education experienced a remarkable shift from apartheid education to democratic education. The shift has been remarkable in that new policies and regulation were gazetted to govern schools in a more democratic way. The National Education Act, 27 of 1996 stipulates new principles that

underpin the National Education Policy. One of the principles stipulated in the National Education Policy is the protection of the fundamental rights of every person as guaranteed in Chapter 2 of the Constitution of South Africa. 'This Act could be summarized as an education policy that intends to promote democracy, social justice, equity, economic competitiveness and quality learning' (DoE, 2003, p.4). This Act forced all segregated education to be integrated.

4.3.2.1 Integration/De-racialisation of Schools

The participants appraised the establishment of a single unitary education system with a single education department which resulted in among many things, the desegregation of schools. The following statement supported the positive feelings about the desegregation of racially segregated schools. This also heralded a significant shift in terms of access to schools, and hence access to education.

For me the most significant changes are the ones that involve all races coming to the same school. It has been a positive change and another change is bringing the FET instead of 550 Nated systems; and will know there is positive change after the Matrics doing curriculum 2005 have written their exams. But to me they are quite significant changes. (HOD 1.)

I think I have mixed feelings for these changes. I think since most people have an access to education, is a good thing. If the schools are more full because more people are getting educated; it is a positive thing and that creates work for us; that's fine. (HOD7.)

The de-racialisation of schools has been perceived by HODs as good. The participants understood it as a way of making education accessible to most learners irrespective of their race, but the HODs witnessed that it had challenges. Although the participants commended the de-racialisation of schools; they indicated that their work increases due to larger class sizes and the accompanying challenges of dealing with diverse learners.

The desegregation of schools resulted in an influx of learner from previously disadvantaged black schools to previously advantaged schools classified as Indian, White and Coloured schools.

While participants perceived the desegregation of schools as a good thing, they expressed concerns at the lack of preparation for these changes. Educators also faced challenges in dealing with the barriers to learning experienced by English second language learners. In both instances they cited the lack of preparedness of educators to deal with such challenge.

4.3.2.2 Learner Participation

Learner participation was mentioned by participants as associated with democratic education. The South African Schools Act stipulates that learners need to participate in the governance of schools. Voting in secondary schools was introduced by democratic education. During apartheid education there was a prefect system. The prefects were not democratically elected because learners were not involved in the election of prefects. The educators chose certain learners who would supervise and control other learners in the absence of educators. Things changed in democratic education. The policy on the governance of secondary schools stipulated that learners need to vote for their representation on School Governing Body (SGB) meetings.

The participants mentioned that learners are part of decision making in schools. The participants mentioned that democracy in schools was associated with voting for the legal prefect system in schools; representation in the management of schools; decision making in School Governing Body (SGB) meetings and parents meetings and participation in school related issues. It was interesting to note that although all learners are eligible to vote in schools, certain classes are not allowed to vote. It was mentioned that not all learners were allowed to vote. Learners with discipline problems could not be voted for.

We have a very legal prefect system in our school. The only grade that does not have prefects is Grade 8; because we feel they don't know Grade 11s, to be able to vote for them. They have just got into the school.

It works quite well in terms of democracy. All the children can be voted for unless the child has acquired serious discipline issues, that child can never be elected as a prefect. So there is quite fair amount of democracy (HOD 1).

One participant used legal prefect system instead of Representative Counsel of Learners (RCL) as an old terminology that was used during apartheid education era. The participants had certain expectations about the learners in democratic education. One participant compared the learners before democratic education and learners during the democratic era and cited that the latter is characterised by passivity in learners. They complained that learners in democratic education are passive, not involved in social issues, 'docile' and not aggressive and critical in their thinking (HOD 4) and do not fight for their rights. Therefore the learners were labelled as being 'lax and lazy'. There was an expectation in the participants that learners in the democratic education would be actively involved in the management of schools compared to Apartheid Education. The passivity of learners' contradicted what the NCS curriculum envisages. The National Curriculum Statement Grades 10-12 (General) Policy Overview states the following:

The kind of learner that is envisaged is the one who will be imbued with the values and act in the interest of a society based on respect for democracy, equality, human dignity and social justice as promoted in the Constitution (DoE, 2003, p. 17).

The participants indicated that democracy in schools has not yet been implemented as stipulated in education policies. The issue of learners who are excluded from voting supports what has been mentioned by the participants that democracy has not reached the ground (HOD 3).

4.3.2.3 Education Policies

The participants were asked to comment about policies that have been introduced after 1994; which is marked as the period of democratic education. Did

democratic education inculcate the culture of democracy in schools? The participants criticised the policies as contradictory to democratic education. They mentioned that there are policies that are perceived as promoting democratic education yet they have no evidence of democracy. They witnessed that they have experienced non-democratic practices from the Department of Education down to the educators. The participants felt oppressed by the hierarchy in the Education Department. They cited their frustration by regarding policies as an evidence of the oppression that has been imposed on them.

We have change that is decided on elsewhere and it's imposed on us and we must do it (HOD 4).

The participants highlighted that democracy is perceived as a policy that needs to be implemented by all schools.

Many of the policies that were introduced by the department of education after 1996 were very democratic policies. (HOD 4)

Schools are not fully democratised. There is no transparency. No democracy from the top down to the learners. (HOD 3)

I also think that our schools experience is not democratic system from the Education Department. (HOD 1)

I strongly feel they have not been fully democratised. Starting from the principal even the HODs' democracy has not gone down to the ground. We are still stuck. You see ... even in issues there is no transparency. (HOD 3)

The participants complained that there is no democracy even in their schools where they teach. Although the Department of Education aims at the democratisation of schooling,

the participants complained that there was no democracy in schools. The participants highlighted that it is difficult to implement democracy. They also mentioned that they themselves are not democratic in their practices. One participant uttered the following statement:

We educators are not transparent to the learners. We don't even show them their marks. We don't show them the mark sheet where we write them. I am even one of those. Democracy has come. Look at your marks and how I have scored it. See how I have arrived to this mark. In terms of the principal they tend to take things on their own. They are reluctant to delegate to their immediate subordinates; even their feelings to us as HODs. Sometimes we group ourselves and tend to do things on our own. We are not democratic in terms of delivering our duties. And in doing that we are not learning. In democracy we are all in the learning curve. The stress is on the educators themselves when they try to be democratic, tend to abuse the situation (HOD 3).

The participants highlighted that democracy was difficult. They viewed democracy as an ideal, but a difficult thing that could not be fully practised. They stated that sometimes it might not be enjoyed due to the responsibility attached to it. They mentioned that dictatorship was easier than democracy because democracy demands accountability and responsibility. The participants gave the following comments:

It is hard to be part of democracy because people might not want it in some areas. If people have too many choices they do not enjoy it because they are used to be told how to do things. People accept dictatorship or leadership of other people because it is easier (HOD 1).

With democracy things are quite difficult. (HOD2).

The participants indicated that there were challenges that they were experiencing in the democratic education. Consequently, the HODs experienced dialectical tensions. The participants indicated that there were new policies that have been gazetted that affected their roles and responsibilities as HODs. Although

educational changes were perceived as positive by all participants they were reported as having negative effects on HODs. The participants highlighted that changes were good but they have been ‘fast tracked’. The response of participants highlighted the need for research on why changes had to be fast tracked. Whose agenda was being addressed by the changes?

The participants complained that they were struggling to interpret the curriculum due to inadequate time spent on the introduction of changes and the lack of preparation of educators for these changes. One participant cited the following complaint:

As policies and changes in curriculum are, I personally feel that they have been rushed in too quickly without much research, concentration and time to actually develop the curriculum As a result it's difficult to implement. There are good things and bad things, but I think as educators dealing with very complex situations, I think we are dealing and we live in the complex country. The things we deal with as educators in a school are a reflection of the society around us which is complex and challenging. And there are good things and bad things adding to the challenges (HOD 7.)

The participants complained that whilst they were trying to understand one curriculum another one was introduced. They quoted the introduction of 550 Nated Curriculum, OBE curriculum (C2005) with RNCS, and NCS as being fast tracked. The struggle to understand the new curriculum is associated with new terminology that has been used in the new curriculum. One participant complained about the changes in the terminology used by the new curriculum:

Like if you look in education the change of terminology now and again, C2005, OBE, RNCS and NCS one after the other; before the educators grapple with the other terminology they are showered with another terminology and it makes them to be uncertain. It brings uncertainty to educators. It doesn't give space for good grounding. Once they try and

grasp the concepts then there comes another system of education over a very short space of time (HOD 3).

The participants sounded confused about the curriculum after 1994. The change of terminology has misconception that there has been an introduction of different curriculum.

The participants were frustrated by the failure to understand the terminology used in the new curriculum because according to the PAM document the HODs are the people who are supposed to interpret and implement the curriculum as prescribed by the Department of Education in their schools. The HODs highlighted that they needed enough grounding in the new curriculum before it could be implemented. One participant used words like: 'showered with another terminology'. That analogy highlights that whilst the HODs were struggling to grasp the concepts introduced to them; they were then expected to grasp other new concepts within a very short space of time. That means the participants were struggling to understand the terminology used in these changes, which then resulted in their deskilling.

The training the HODs received when they were trained as educators has become irrelevant. Even if you have an experience of 20 years you battle like a new educator in the field (HOD 1).

This year we were confused where to start the on the new syllabus (HOD3).

Deskilling is one of the dialectics described by Kanpol (1994) as a technical aspect that reduces the educator's duty into the applications of rules executed by someone else's goals and plans. Deskilling reduces the autonomy of educators by increasing more control over the teaching process by making educators more accountable for state mandated curriculum (ibid). The deskilling of HODs happened when they experienced uncertainty

in their practice as professionally trained people with expertise to do their work effectively and efficiently.

The participants indicated that the policies that have been legislated are deskilling them. As a result all participants complained that they were not coping with the new demands of democratic education. Adding to the frustration the HODs had was the issue of new management and leadership styles.

4.3.2.4 Management and Leadership

The core duties of HODs are management and leadership in schools. The participants were able to identify that the democratic education demanded new management and leadership styles.

I can also say that the significant change has been the management changes in terms of authoritarian type of leadership to democratic type of leadership which has spilled even to learners where educators have not to be so authoritarian when dealing with them like the abolishing of corporal punishment, which was enforced to learners, where learners are now not taken as people who have to submit; but there to be taken as thinking beings. I think that has been a significant change (HOD 3).

The participants reported that the administrative work has increased due to the increased number of reports that needed to be submitted to the Department of Education (DoE) than before. Adding to the stress of the HODs was the choice of textbooks relevant for NCS. The participants stated that the choice of textbooks was time consuming and frustrating since they were not given enough direction by the DoE as to which books were recommended for the learning outcomes and performance standards that have been prescribed by the National Curriculum Statement.

4.3.2.5 Unionisation of Educators

The participants also associated democracy with the educators' participation in educator unions. The Department of Education was criticised for promoting the unionisation of educators. One participant complained that Department of Education was deducting money from educators who are not members of the unions.

But our country is democratic when it comes to educators unions. If you are not a member of the union they take all your money the same as those educators who are the members of the union; which I cannot understand. The department is for unionisation. And these are the problems sometimes. How do you view educators? Educators sometimes do not want to go on strike. They want to teach but the union say they must go on strike. They are the union members and so they have to obey your union because there is no other alternative. So these are the problems. Democracy comes through that at times. And that's a major issue (HOD 4).

The participant mentioned that it was a way of coercing educators to be union members. That means educators who have not joined any union are forced to pay for not being members of any union. The HODs perceived that act of forcing educators to be unionised as a sign of oppression. Oppression was viewed as a contradiction to democracy as it was being perceived as being promoted in education.

4.3.3 Conclusion

Education was perceived as a way of preparing learners to become responsible citizens. The participants had mixed feelings about democracy. They reported that democracy was difficult and could not be practiced to the fullest. The participants reported that schools are not fully democratised since there is no transparency and accountability from the Department of Education down to the learners in the classrooms. The participants

highlighted that the autonomy of HODs has been minimized by educational reforms through policies and regulations. The governance of schools was perceived as deskilling HODs.

4.4 The Curriculum Reforms and Implementation

4.4.1 Introduction

Curriculum Reforms and Implementation has been one of the major themes that have been illuminated by data. Hence, I am not intending to engage in a discussion of curriculum and curriculum reforms, but my study aims at presenting the findings about the perceptions of HODs about the educational reforms and how their roles, responsibilities and their professional lives have been affected by these changes. I feel it is important to mention that my study is not a curriculum investigation but it is attempting to shed light on how education reform has affected the work and professional lives of middle managers in secondary schools. The curriculum reforms and implementation theme had three sub-themes. These were Educator Development, Policy Imperatives on scarce subjects like Mathematics and Science and Learner/Educator Relationships. I have presented the sub-themes as I have listed them above.

4.4. 2 Educator Development

In this sub-theme the responses of participants showed dialectical tensions. Although the participants perceived the educational reforms as good, they cited their concerns about the implications of the educational reforms on their professional lives and their work.

4.4. 2.1 Dialectical Tension/Polyvalent Discourse

The participants' feelings about educational reforms had examples of dialectical tension. Dialectic is described by Wink (2005, p. 41) as 'tensions between opposing thoughts, idea, values and beliefs'. Data revealed that all participants experienced dialectical tensions about the new educational changes. The HODs had a particular knowledge of education reform, which was positive, but their outlook displayed a negative approach to the educational challenges. The participants reported that the educational changes have been 'fast tracked'. The data illuminated that the participants were trapped in 'polyvalent discourse' because they had to manage and support educators as people with authority and power, yet their power is restricted to certain narrow parameters.

PAM document states that the HODs are expected to monitor and support educators. Let me explain what support means. Stein (1980, p.1320) defines support as holding up or adding strength to something. That means the HODs are expected to add strength to the educators they support. The HODs experience dual identities. In order to illustrate these dual identities I have borrowed a term used by Ball (1993): 'polyvalent discourse'. 'Polyvalent discourse' is a term used by Ball (1993) in describing the situation HODs find themselves in. Stein (1980, p.1452) defines the 'valence' as a piece of drapery that is hung across the top of a window. The word 'poly' is defined as having more than two 'valences'. The verb 'trapped' describes the state of being in a concealed or restricted danger (ibid.1398). Ball (1993) argues that managers in schools both 'liberate and enslave'. Ball's argument highlights that the HODs are expected to 'police' educators and at the same time 'support them'. Ball (1993) uses the phrase 'trapped in a polyvalent discourse'. It is through these tensions of being in authority and expected to share power with the people you lead that 'polyvalent discourse' prevails.

The participants perceived educational reforms as good but the implementation of curriculum reforms was a challenge to them. Consequently the HODs experienced mixed feelings and dialectical tension about the educational reforms and their implementation.

I think I have mixed feelings about these changes (HOD 7).

Although the participants were positive about the introduction of new curriculum changes they felt the changes were oppressive and minimising their autonomy as professionals.

Moos (2003) argues that there is tension between the leadership role and the management role of educators in schools. Moos (2003) claims that being a manager has a connotation of power, on the other hand leadership refers to being a co-worker with people you lead. Management and leadership in schools have a dialectical tension. All eight participants acknowledged their work as primarily based on monitoring, controlling, supervising and supporting educators. These dialectical tensions elicited frustration and dialectical tensions in the HODs. In order for the HODs to cope with the work they have been entrusted to do, they had to work longer hours and their workload increased.

Whilst the HODs were struggling to cope with the stress caused by the curriculum reforms and implementation; they also experienced a push to promote scarce subjects for skills development. Therefore the educational reforms and implementation coerced them to be 'skills technicians' Gough (1999) argues that the processes and effects of economic and cultural globalisation are evident in curriculum policies and school programs with particular reference to the ways in which globalised media (such as television and the Internet) are deployed in the construction of school knowledge.

4.4. 2.2 Policy Imperatives on Scarce Subjects like Mathematics and Science

Dimmock and Walker (2000) argue that schooling and school management and leadership in the twenty-first century are redefined by globalisation. They state that the

evidence of that are the policies and practices that are dominated by international influences. The developing states are accused of adopting systems from Anglo-American societies that set the education trends in global economic development, communication and technology. They criticise the global influences for transposing business management and leadership principles in education. They claim that businesses and schools have different agendas and purposes. The primary aim of business is to accumulate profit, whereas schools are concerned with processes and outcomes that are not easily measured (ibid). That means the business principles in education impact on the roles and responsibilities of school leaders.

Edwards and Usher (2000) argue that the impact of globalisation on curriculum deals with matters that need to be covered in learning aiming at enabling learners to be engaged as global citizens. In keeping with this idea the South African education aimed at preparing all learners to be global citizens. The National Curriculum Statement states distinctly that the South African Education has been transformed due to the imperatives of social and economical developments and globalisation ((DoE, 2003, p. 2).

The participants were asked to give their perceptions about the importance of Mathematics and Science in the curriculum. All the participants felt Maths and Science were important subjects in the curriculum. The narratives of two participants highlighted that Maths and Science are like all other subjects, but there was inconsistency in their responses because the same people who equated Maths and Science to other subjects used a metaphor that highlighted that these subjects are crucial. These subjects were viewed as “doors to many faculties of education” (HOD 2). The participants associated Maths and Science with careers and jobs. The participants stated that learners are pushed to do these subjects. One participant stated that the subjects are given status due to their demand globally. Prof Kahn (2001) reported that the South African Education had to turn the education system around by employing Human Resource Development Strategies that could improve skills development through accelerated skills development programs in critical areas such as Mathematics, Science and Technology (M S & T) in order to compete in the global competitive economy.

They are giving it status and knowledge, according to my experience. But some few learners, but I'm talking about majority don't. But the minority, some few learners love it because they know the implications of having it but on the side of the department of science they give it that status, big status. Then why I think the second reason of the second question was why. The reason why the department is doing so because the department is trying to promote it for the benefit of the country because the department is paying so much money for the education of a child in the country and they want to see it bearing fruit. So bearing fruit means we've got people who are qualified and capable to do things that are not normally done by people in our country because our country seems to be lacking in technology, in Maths and Science; skilled working class people with no skills, people do not have skills, knowledge. So they import knowledge and skills from other countries. (HOD 8)

They cannot proceed because most of them chose general subjects. Once they go to the real world up there and find that there is no job for them. And when they go back they could see where they have made their mistakes of not choosing Maths and Science. There are the ones when they get into Technikons, Universities and all their likes are still expect them to have Maths and Science. (HOD 2)

The above statements are highlighting that there was a push by the Government to promote Maths for the benefit of the country, since tertiary institutions require it for certain fields of study. All participants responded by stating that learners are pushed to do Maths and Science by their parents, the society and educators. Although one participant indicated that there are myths about Maths and Science subjects. For example these subjects are perceived as subjects for boys, brilliant people, unmanageable and as being difficult subjects. Nevertheless, the society still promotes them as subjects that are in high demand.

The subjects that were in high demand were not only Maths and Science, but they included new subjects such as Maths Literacy, Computers and Technology. The new curriculum came with an introduction of new subjects as an additional workload for the HODs. The participants mentioned that were managing most, if not all, the new subjects.

According to following account the new curriculum is now forcing learners to go out and get job experience, which is a good thing that would help them. Therefore the new curriculum has linked education to the world of work. According to Kellner (2003) the neo-liberal policies in education associated with globalisation prepares learners for the world of work. The preparation of learners for the world of work is intensified by globalisation. The participants supported the idea of linking education and the world of work due to a global imperative.

The participants complained that although there is a push to do Maths and Science there are few qualified educators who can teach Maths and Science, but due to the global pressure the Department of Education had to promote it, emphasising that all learners needed to become mathematical literate. The issue of the scarcity of educators to do new subjects is an indication of the complexity global agenda on education reform which cannot be addressed by a project like Dinaledi. The Dinaledi project seem to be patricianly addressing the government's agenda of global economic competitive. The promotion of Mathematics and Science in schools has been a part of a national education campaign through the project called 'Dinaledi' in secondary schools. The rationale for the promotion of Maths and Science in schools was perceived as:

The reason why the Department is doing so is because the Department is trying to promote it for the benefit of the country because the Department is paying so much money for the education of a child in the country and they want to see it bearing fruit. So bearing fruit means we've got people who are capable to do things to qualify, to do things that are not normally done by people in our country, because our country seems to be lacking in technology, in Maths and Science, skilled working class people with no skills, people do not have skills, knowledge, so they import knowledge and skills from other countries. (HOD 7)

The observation highlights that South Africa experiences shortages in scarce subjects such as Technology, Maths and Science. It states that our country needs skilled working class people with skills and knowledge so the country does not import knowledge and

skills from other countries. Therefore the introduction of new subjects is an attempt to address that need. Data revealed that schools are the sites of addressing the social, economic and political agenda of the country. The report by Kahn (2001) indicated that the South African Education has developed a strategy of improving skills development in Mathematics, Science and Technology. The acquisition of skills in learners is associated with the alleviation of poverty.

Well, the reasons I firmly believe it basically boils down to our socio-economic problems that our country is experiencing. High levels of poverty and also the venue where our schools are located - 80% of our schools are located in the rural areas. (HOD 1)

The participants mentioned that the performance of learners in Maths and Science is impeded by learners' socio-economic background. They mentioned that in South Africa there is a high level of poverty and with such a high percentage of our schools located in the rural areas, which could be the reason for poor performance in the scarce subjects such as Science and Maths. Kelsey (2002) argues that the new capitalist economic system erodes the national democracy and sovereignty of states by imposing neo-liberal policies on nation states and eventually perpetuating social inequality. One participant mentioned that the Department of Education is spending a lot of money on technological advancement in schools.

How much does it cost to buy a digital projector? How much does it cost to buy a laptop per school? (HOD 4)

Although the Education Department might aim at promoting the technological advancement in all schools, the learners from the rural areas will not benefit from the campaign due to the lack of electricity. In other words, technological advancement in schools promotes inequality of learners unintentionally.

The policy imperatives on scarce subjects like Mathematics and Science have coerced the HODs to be 'skills technicians' therefore degrading them as professionals.

4.4.2.3 Learner Educator Relationship

Although change has been praised for being good, the participants raised serious concerns about the impact of educational changes on both educators and learners. Although my study is on educators, I cannot underestimate the pivotal influence the learners' well being has on the professional lives and work of educators. Teaching is a profession that is based on the interaction between educators and learners. Anything that affects the learners impacts on the professional work of educators. Data revealed that the HODs were concerned about the kind learner produced by the new curriculum.

The new curriculum was criticised for increased numbers in class. There was a concern that changes resulted in bigger numbers in classes. The increased numbers in classes were criticised as contributing to ineffectiveness of teaching and learning, which is detrimental to both educators and learners. One participant cited the following response:

I know before 1994 I had a class of 30 children, 35 children. For me it was an issue right across the board. But now a class of 45 is not an issue, but pastoral care to children is hard to do. They are too many. The more you have the less you deliver as far as I am concerned. In terms of pastoral care you cannot give much more care. (HOD 4)

The above response illuminated that the HODs are concerned about the well being of learners because that affected the way educators teach and learners learn. The participant highlighted that 'the more you have the less you deliver'. As a result the 'pastoral care to learners is hard to do'. These statements highlight that the participants are not only imparting knowledge to learners but they are also expected to consider their new roles and responsibilities as educators. One HOD highlighted that teaching goes beyond teaching in the classroom.

If you look at the educators then after 1994 and look at the educators now, look at the roles of educators, I think the educator almost form the entire life of a learner. Pastoral role, all those seven roles of an educator has changed everything. That is why I said the challenges we are now facing, the thing we have to help the learners with, you can be able to see that these challenges go beyond just going to the classroom teaching them. (HOD 2)

The participants highlighted that the curriculum reforms and implementation were not only affecting the HODs but they were also affecting learners. The participants reported that learners were experiencing discipline problems that were associated with human rights. One participant complained that the problem of discipline in schools was a result of learners' abuse of democratic rights without any responsibility. He mentioned that we should not associate discipline with corporal punishment. All participants mentioned that the discipline of learners was a problem to them.

There is an increase in discipline issues. There is a direct correlation with increased numbers in our society and then generally an increase in the crime rate. You know in the past one was dealing with naughty children in a school, but now we are dealing with criminals in the schools in terms of theft and that sort of thing. (HOD 7)

The lack of discipline in schools was associated with social, economical and political factors which are beyond the participant's control.

4.4.2.4 The Assessment of Learners

The participants viewed the assessment of learners as one of the crucial challenges to both educators and learners. The participants tended to compare the old system of assessment and the new system, and commended the old system for challenging learners to study. Whilst some participants criticised the new assessment policy as inconsistent, passing learners who do not deserve to pass and not forcing learners to study, others commended it for giving learners a chance to be assessed on different activities. The participants gave the following responses:

It has also changed the methods used during those times. It was a matter of testing for exams only, but now they are being assessed on different types of activities. (HOD 2)

I disagree completely. I think the new assessment enables children who may be not very good that's fair but still do not think that they will do exceptionally well when they are required to work on their own, than the children who are being phased out. They were able to sit back and get it sorted out, but now the kids I think; our children are more confident than we used to be. They are prepared to speak out. I think they have been advantageous. I think our kids ... I've found them much more confident than the children I teach. (HOD 6)

The concerns of the participants have been indicated by complaints from the higher education institutions that learners produced by NCS are struggling to cope with academic work. One participant mentioned that there was inconsistency in the assessment policy of learners in GET and FET phase. The participants criticised inconsistent assessment in Grade 9 and in Grade 10 as detrimental to learners since learners are not prepared adequately to write examinations. The participant complained that the policy makers have widened the gap between Grade 9 and Grade 10 assessment strategy. They stated that there is jump where learners are expected to have 25% examinations and 75% Continuous Assessment (CASS) in Grades 8 and 9 and then suddenly they are expected to do visa versa - 25% CASS and 75% examinations in Grades 10-12. One participant criticised the inconsistency in the assessment as one of results that lead to high failure rate.

Our learners are suffering because we have moved away from that exams oriented type of learning in GET phases, but the Department has not phased in into FET phase and the end of GET phase. So the children have a problem. We have lost; we are losing 550 Nated as we have seen it as children were forced to study. Children do not know how to study. (HOD 5)

The participants did not only view assessment strategies as flawed but they voiced their concern about the quality of the learners produced by the new assessment strategies and the quality of education received by learners. The respondents felt the new curriculum

was not preparing learners for tertiary education. The participants doubted the value of education received by the learners as illustrated by these observations:

I am not quite positive. I think we gonna loose good, and I am a little bit worried that some of the changes are not going to make it. The children are going to come out with education that is actually not very, very valuable because they are going to come out of school, passed few subjects, maybe fail one, and so come out. (HOD 1)

Our learners are not aggressive in their thinking (HOD 4).

The feelings about the changes made the participants experience dialectical tension. The response of the above participants highlights tension. The participants reported that the new curriculum reforms were deskilling them because they were making them uncertain about their work. The educational reforms have positioned the educators in such a way that they find themselves struggling to perform the duties they have been trained to do. The educators gave different responses that highlighted that they were struggling to perform their duties. The following responses were given:

When we came to the old syllabus, you just knew a great deal of work; what you needed to do, desired objectives but now looking at it makes you really want to network more with everyone around you; from ordinary educators ,your peers ,the SMT, others school educators; other schools in you cluster group, your friends and also at home. (HOD 6)

Well I think in one way it has made it more challenging. So in that respect it is more interesting also more difficult; certainly more exhausting. I don't know how you find it. As an educator I go home very tired and I'm working harder but I still find it has a positive role to play. (HOD 7)

How can you help them; they are hungry, how can you help them if they are pregnant, how can you help them if they are in jail? See there are so many challenges that you cannot just expect homework from learners 'homework akanayo' and then you find out, this learner's parent died yesterday. This learner delivered a child yesterday so, she couldn't do homework, she couldn't do an assignment. (HOD 2)

The participants also complained that the centralised curriculum was restricting their autonomy since the learners were going to write common examination papers. The new curriculum prescribes performance standards and assessment standards that need to be covered by the Learning Areas.

They are trying to bring standardisation in terms of different races. Now that we did not have equal access to, education they are trying to respond to all these pressures they have sat down and tried to address all these things they have not tested. (HOD6)

The participants viewed the centralised curriculum as not effective since schools have different when it comes to the equal access to education. The centralised curriculum reducing the autonomy of educators as professionals, with expertise and forces them to conform to the standards set by the National Curriculum Statement.

4.4.2.5 Conclusion

The participants complained about the challenges imposed by the educational changes on them but they perceived changes as good. HODs perceived the new curriculum as deskilling to them by increasing their workload. The HODs mentioned that they are expected to implement the new curriculum, develop new learning materials, select assessment methods, and develop new management and teaching styles. Most participants highlighted that their work is frustrating them and resulting in them being uncertain about their jobs. They felt the new curriculum has been rushed in too quickly. They complained that whilst they were trying to understand the one curriculum, another one was introduced. They quoted the introduction of 550 Nated Curriculum, OBE Curriculum (Curriculum 2005) with RNCS, and NCS as been fast-tracked. They reported that the administrative work has increased due to more reports that needed to be submitted to the Department than before.

The new curriculum changes had detrimental effects on learners and educators. The participants criticised it for deskilling both educators and learners. The deskilling of learners resulted in the production of learners who fail to cope with the academic work. The HODs are expected to support educators in terms of helping them with the actual content in class. The HODs are accountable and responsible for the performance of learners in the subjects they manage. The participants compared the former education system to the new education system and commented that the new system is more frustrating and deskilling to both educators and learners. The participants complained that the new curriculum was not preparing learners to cope with academic work in the higher institution. Consequently the learners produced are not adequately equipped to participate actively in the democratic country. The dialectical tensions were prevalent in the participants' responses. The responses of participants revealed that there are complexities in analysing their roles and responsibilities.

4.5. School Management/Administration

4.5.1 Introduction

The school management and administration are stipulated in Personnel Administrative Measures (PAM) as a policy document that generally cites the job description of the HODs in public schools.

4.5.2. Personnel Administrative Measures (PAM)

According to Personnel Administrative Management (PAM) the HODs are educators who have been assigned a duty of managing in the school. The core duties of HODs in South Africa as determined by Personnel Administrative Measures (PAM), as stipulated by Employment of Educators Act 76 of 1998 include teaching, involvement in extra and

co-curricular activities, personnel administration, general administrative work and communication, and the supervision and management of educators. For effective school leadership the HODs are expected to teach and carry an 85% teaching load in secondary schools, be a class educator if required, assess learners and keep records. The involvement in extra and co-curricular activities could be summarised as controlling all the departmental activities that involve support and provide support; co-ordinate guidance to the educators: develop policy for the department; be involved in general administration of the whole school and liaise with all stakeholders in education.

PAM associates accountability with the personnel duty to participate in an agreed school/ educator appraisal processes in order to regularly review the professional practice of educators with the aim of improving teaching, learning and management in schools. In South African education accountability is linked to IQMS. The NPM emphasise accountability as the key element that mainly uses control as a mechanism of monitoring all the processes that involve centralised curriculum. The centralised curriculum coerces the school managers to conform to the standards set by the national government (Mulford 2003, p. 9) by taking on the new roles and responsibilities. The participants complained that their roles and responsibilities have constantly been changing.

4.5.3 Teaching and Learning

The participants reported that they were responsible for teaching and learning processes. Teaching and learning involves doing administration work; assisting in the management of the school; managing the curriculum; monitoring the implementation of policies, making sure that educators are on track (even subjects they do not teach), and choosing textbooks relevant to the new curriculum. The participants cited that they manage their departments, check educators' portfolios, give orders and information to educators and provide support to educators. All participants mentioned that they were in charge of assessment in their schools. They mentioned that they were expected to monitor and manage examinations. They reported that their significant role started from the setting of

papers, moderation of papers, safekeeping of papers, the drawing up of the invigilation time table, preparation of examination centres, and they are involved in the monitoring process of the whole examination. After any assessment has been written the participants were expected to support educators, to evaluate the educator's work and offer support where there is a need to support. Most participants mentioned that they manage subjects that do not fall in their area of specialisation but they were responsible for the management of those subjects including the setting and the moderation of papers.

The HODs reported that they have not been empowered to cope with new curriculum challenges. Although the HODs mentioned that the Department of Education organised workshops to equip educators about NCS, they complained that the workshops organised were not informative enough to empower them and some of the facilitators were not well informed about the NCS. Some of the facilitators assumed that the educators understood NCS terminology. Consequently, the workshops organised for the educators did not equip them to face the new curriculum challenges. One participant complained about the workshops in the following words:

The Department needs to come under major criticism because they have not delivered in terms of educators' empowerment. We have been to courses. We have been to all these brilliant courses where the new curriculum has been phased in. We go and sit there and the people that are delivering in these workshops are as confused as we are. And they can't get through that confusion because they haven't done their work properly. They pull educators out of their schools that have to do the schoolwork and they do very little in unpacking things for us. We are not getting what we should be getting in terms of these workshops. I think these workshops are a waste of time in most cases. I think we should take over these workshops and run the workshops ourselves. And to me it does not make sense because we are just as lost as everybody else I have been teaching over about 25 years but we don't know what we are teaching. In terms of how far we teach and how deep we teach. What the Department needs to do is to close all the schools for the whole year, give the children one year holiday and take every educator and workshop them for the whole year about what to teach and empower every educator to pass every child that year. And the next year the educators would be far more empowered because the educators would know what is going to happen. The children

would not have lost the year of studying because children are losing more than a year of study because of the educators that are not experienced enough to teach the curriculum the way it should be taught. (HOD 4)

The participant commented about the inefficiency of workshops due to the lack of informed facilitators who are not grounded on NCS. The above comment reveals that the workshops were given inadequate time. The workshops organised during learner's contact time were criticised for stealing learners' contact times. The statement of this participant is highlighting the urgency in empowering educators with skills to implement and interpret the NCS curriculum. The participants showed a sense of despair experienced by the educators who are expected to implement the new curriculum without any proper guidance. The issue of the organisation of workshops for educators reflects a sense of dependency. The educators are not taking the bull by its horns. There is a feeling that the HODs want to run the workshops themselves. The question that could be asked is that if they know what is expected of them why are they not doing it? Can the HODs empower each other? If that is the case what prevents them from empowering each other?

The participants reported that their job description includes supporting and monitoring the implementation of the Curriculum yet the Department of Education does not empower them and support them to cope with their work. Although some of the participants have been teaching for quite a long time, the changes do not accommodate their experience. That means the HODs are struggling like inexperienced educators in understanding the new curriculum. Therefore, the HODs felt they were not equipped to support educators by developing and interpreting the curriculum. The participants reported that the educational changes made them disillusioned and confused. The question could be asked how they are going to support the educators in their departments if they themselves are not certain about what is expected of them. These are some of the participants' complaints about the new curriculum changes:

When they issue these work schedules it's my problem I want to confess, you see, I look at the pace I found that kids have to write paper 1, paper 2 and paper 3 that I have not completed paper 2 in terms of their requirements. The pace is too fast. (HOD 3)

We never knew what was to be set in June, what will be set when some of the people started where the book starts, some decided they haven't started because that is much better. (HOD 3)

There is a feeling that educators who have just received their educators' training understand the new developments better compared to the old educators. The feeling of despondency makes the HODs feel inadequate to continue with their jobs as HOD. "I want to go back to be a post level one educator" (HOD 4). The response of the participants highlights their frustration and a sense of despondency.

4.5.4 Educator Appraisal (IQMS)

Data showed that the HODs had assumed new roles and responsibilities that are oppressing and exploiting them. They reported that they were responsible for the implementation of policies such as the Integrated Quality Management Systems (IQMS). They mentioned that as managers of the educators they are members of Development Support Groups (DSG) serving as seniors of educators in their respective departments. They monitor the smooth running of the IQMS process and form part of the School Development Team (SDT). The HODs reported that they evaluate educators and support those who need to be developed.

Although the HODs accepted their involvement in IQMS one participant highlighted that the implementation of policies is problematic. One participant gave the following response when they were asked to comment about their feelings of conducting activities such as IQMS and the supervision of educators.

My involvement in IQMS is that I'm one of the members of DSG of each educator. That's development support group for each educator as an HOD for that particular department. So I have at least 10 educators in my whole department. So I'm part of 10 DSGs. That means I have to interview and assess 10 educators. It's a mammoth task, but you get stuck; definitely get stuck (HOD 8.)

Many of the policies that were introduced by the department of Education after 1996 were very democratic policies. Policies in theory that looked brilliant but you know we can theorise on many things and it look very rosy [sic} but the implementation failed. The IQMS policy could be used by certain autocratic HODs or management to keep educators' in check. (HOD 4)

Although IQMS interferes with their teaching times and is time consuming; they felt it was their responsibility to monitor; evaluate and support educators in their departments. They highlighted that they are members of DSGs for each educator under their supervision. They say that it is time consuming but inevitable to them because it deals with supporting, monitoring and evaluation of educators. The data that I have collected illustrated two policies that have increased the workload of HODs. These are Post Provisioning Norm (PPN) and Integrated Quality Management (IQMS) policies. One participant highlighted that PPN has poor factoring since it does not cater for the time allocated to HODs to have free lessons. The participant stated that:

The HODs carry big load because the department of education PPN policy does not factor in the HODs' free time to make sure that their duties, the core duties are able to be carried on during school time. You cannot do this after school hours. I cannot be looking, walking to educators after school hours. I have to teach my class, so that is where the tension and the stress is coming. But I believe if you take your duty as an HOD it is 100%. (HOD 4)

Although they are working so hard without the government's support and adequate training, they are not getting any incentive for the hard work they perform. The participants display a sense of dependency yet they want autonomy. This highlights the complexity of the work of HODs .The HODs need to develop a sense of agency by

challenging the department to understand how they should do their work at school without any frustration. One participant complained about low salaries. All the HODs complained that their workload is too much, and that they are not paid according to what they do. This participant highlighted that teaching is a 'calling not work'.

We are not paid. Unfortunately our salaries are pathetic, but to me education and teaching is a religious thing and it is a good thing; that is a difference. I believe that's giving a service, service to the community, God and for me. At the end of the day I close my eyes I feel the job is well done. That's a difference. I suppose that was my motivating factor. (HOD 4)

Some of the participants felt that they are not coping with their work.

This frustrates people who want to perform. The work load has become more intensified in terms of we have to carry. More are duties in terms of teaching within the classroom. (HOD4).

One participant mentioned that the HODs who want to perform are frustrated and experience constraint by the situation they find themselves in. Educators dedicate themselves to adapt themselves to serious inexplicable conditions by comforting themselves that they are contributing to the well being of the country. Although the HODs perceive their work as deskilling and with no support provided to deal with stress, they felt they have to continue doing it because they perceive their work as service to the community.

The participants tended to compare their challenges as educators before the introduction of democratic education and the challenges as educators in the new dispensation of democratic education and they reported that their work is more challenging. The curriculum changes have added more responsibility and accountability to the HODs. The evidence of this is the following narrative: "I would rather be a level one without responsibility". (HOD 4)

According to this statement the level of responsibility of HODs has escalated compared to the HODs in the 550 Nated System. One of the responsibilities mentioned by the HODs is the pressure to finish the syllabus.

I think all of us are a bit under a lot of pressure to finish the syllabus since it is extremely long. Although it sounds like a good idea as covering a lot in the faster area, it also means that we teach flat out every lesson. There is no chance for the children to rest and absorb, before we go to the new thought. That's fine if we teach real clever kids because they enjoy the challenge of getting a new whip. But when you teach children who really battle you need days to get through and there is no time. You either finish the syllabus, or you teach it badly or unsatisfactory. I would like to teach my subject properly. I would like children to come out of class saying: Yes, I understood, or show that tomorrow I will understand; whereas every day I explain something to them; I have never been sure whether they understood everything. I think that to me is a bit of a problem. (HOD 1)

The deskilling of educators is evident in that they needed more training and a lot of networking and interaction in order to keep abreast with work challenges demanded by the new curriculum. Some of the participants had longer teaching experience, above twenty-years that has become valueless to them since they have to learn new methods of teaching and incorporate new technologies in education. The educators indicated that the new curriculum is exhausting and depressing to them. The educational reforms are compelling educators to be lifelong learners. The concept of lifelong learning is supported by The National Curriculum Statement Grades 10-12 (p 5) that states that it visualises educators who are qualified, competent, dedicated and caring. The NCS expects educators to fulfil seven critical roles that 'include being mediators of learning, interpreters and designers of Learning Programs and materials, leaders, administrators and managers, scholars researchers and lifelong learners, community members, citizens and pastors, assessors and subject specialists' The new roles and responsibilities as outlined above are perceived as oppressive and exploitative by the HODs and they perceive the new curriculum as disempowering the HODs.

4.5.5 Challenges

The HODs cited many challenges that are affecting their professional lives and work. I have presented some of their challenges by what they have mentioned. They mentioned that they needed new management and leadership skills in order to cope with new education challenges; new teaching styles and they indicated that they experience tensions between the allegiances to the subject (curriculum leadership) versus administrative role.

4.5.5.1 New Management and Leadership Styles

In comparing the challenges confronting HODs before and after the introduction of democratic education they reported that the new dispensation has not only increased their roles and responsibilities but it has also intensified the role of an educator due to social, economical and political changes. The following response revealed that:

If you look at the educators then after 1994 and look at the educators now, look at the roles of educators, I think the educator almost forms the entire life of a learner. (HOD 2)

The participants indicated that the educational changes have added more load to the work of HODs, as with this quote:

It becomes a nightmare to manage the department. We have 8 educators in maths department. So it is a very big department. It is quite difficult to get them together. (HOD 1)

Well it has affected me in that it has added to my role. It has added to my burden, added to my workload. (HOD 8)

The educators gave different responses that highlighted that they were struggling to perform their duties, as the following indicate:

I mean challenging in a more positive light; in the sense that previously when we came to the old syllabus, you just knew a great deal of work; what you needed to do, desired objectives - but now looking at it makes you really want to network more with everyone around you, from ordinary educators, from your peers, from the SMT - others are school educators, other schools in your cluster group, your friends and also at home. (HOD 6)

Well I think in one way it has made it more challenging. So in that respect it is more interesting; also more difficult; certainly more exhausting I don't know how do you find it? As an educator I go home very tired and I'm working harder, I'm ... but I still say it has a positive role to play. (HOD 7)

Data reveals that the HODs are frustrated about the changes that have been set up for failure.

It is difficult to address all these things that have not been tested. These changes are now being tested and the response is shown by the change the educators are experiencing. They are trying to bring a standard to the whole society and that is not successful. (HOD 3)

4.5.5.2 New Teaching Styles

The NPM expects the effective school leadership to acquire new skills in order to cope with the new demands of the new curriculum. The changes demanded new leadership styles and new teaching styles. The following quote highlighted that the democratic education coerces educators to acknowledge that learners have Rights. Consequently, the educators need to acknowledge the participation of learners in their education. The authoritarian leadership needs to be replaced by democratic type of leadership.

I can also say that the significant change has been the management changes in terms of authoritarian type of leadership to democratic type of leadership. (HOD3.)

The skills demanded by the school leadership in NPM are entrepreneurial skills and salesmanship skills. PAM also regards entrepreneurial skills and salesmanship as a core duty and responsibility of HODs. PAM states that the role of HODs is to participate in the departmental and professional committees, seminars and courses in order to contribute to and/or update their professional views and standards. It suggests that the HODs need to keep themselves abreast with the new developments in the subjects they manage. Therefore NMP and PAM highlight the importance of entrepreneurial skills and salesmanship in education because they regard subjects as products to be sold to the parents (consumers). The notion of treating subjects as products leads to the commodification of education. As one participant noted:

What else can I sell? It's my product that's why I live my subject. I am my subject. I cannot sell somebody else's product. (HOD 2)

4.5.5.3 Tensions

The HODs experienced dialectical tensions. The dialectical tension that is related to management and administration was tensions between the allegiances to the subject (curriculum leadership) versus administrative role.

When the participants were asked to respond to the following question: 'If you were to be involved in policy making what would be the key roles and responsibilities of Heads of Departments?' Most of the participants responded by showing allegiance to their subjects. They gave the following responses:

The key role of HODs would be: I think we need to develop more resources within the school, give more support to educators within the

classroom in terms of IQMS. It wouldn't be IQMS as such, but the class; watch how educators teach, give educators direction, especially in the field. For example, I am the HOD for Science. I know very little about Physical Science done at school level, but I have learnt much support there - but I can get educators to interact. I believe sciences should be broken down to Maths and Computer. The schools should have more HODs for subject specific disciplines. (HOD 4)

I think HODs have a better idea of what actually happens in the classroom because it's almost like being part-time manager and part-time educator. (HOD 7)

I think if they could be supporting educators in terms of helping them with the actual content; in class. (HOD 3)

What I would do I would separate the HODs. I would have Department HODs then I would have HODs for the specific departments like Maths HOD, Science HOD and Economics HOD something like that. So that these specific HODs from the Department would put more focus on the needs of his or her Department and the other HODs that have been talking about; would be dealing with general management; nothing specific. (HOD 5)

Although they understood that they should serve as administrators in their departments and at the same time support educators; most participants showed allegiance to their subjects. Although most of the HODs cited that they experienced relationship tangles with educators they manage, they still prefer to work with educators rather than doing administrative work. The roles and the responsibilities of HODs in schools are creating tensions for the HODs. It becomes difficult for the HODs to manage educators who are stressed and to provide pastoral care, something they are say they are also in need of. It has been mentioned by one of the participants that the stress of educators 'filters down to HODs' (HOD 4).

4.5.5.4 Conclusion

To conclude the participants complained about their work that is deskilling them. The new educational changes have positioned the HODs to experience polyvalent discourse. They reported that the Department of Education organised workshops that were not informative enough to equip them to perform the duties they are expected to do. They complained that the new curriculum demanded more time. All the participants reported that they had to work longer hours in order to cope with their work.

The HODs complained about the choice of textbooks relevant for NCS. The participants stated that the choice of textbooks was time consuming. Most HODs felt frustrated by the process of choosing textbooks to be used in the new curriculum since they were not given enough direction by the Department of Education. The participants were frustrated because they are the people who were supposed to interpret and implement the curriculum.

4.6. Summary of Findings

I have summarised the key issues that were illuminated by data.

Five major themes emerged from the data. These were:

1. The issue of the governance of schools revealed that the autonomy of HODs has been minimized by educational reforms.
2. The introduction of scarce subjects in the curriculum is perceived as way of coercing the HODs to train learners to fit in the world of work. The idea of forcing educators to produce workers with skills is way of reducing broad education agenda into 'skills technicians'. The reduction of education into skills

technician is criticised by the notion of social justice which argues that it leads to the degrading of educators as professionals.

3. The educational reforms create tensions between allegiances to the subject (curriculum leadership) versus administrative role
4. Educational reforms are exploiting HODs.
5. The new curriculum has positioned the HODs to experience polyvalent discourse in their roles.

4.7 Summary of the Chapter

I conclude this chapter by stating that the participant's experienced dialectical tensions in their professional lives and work. One participant highlighted that life has complexities. Although new curriculum changes have been perceived as good, the participants reported that they have experienced negative challenges in the implementation of it. The participants complained that the new curriculum elicited frustration and negative feelings to them, making them experience inefficiency in performing their job. They complained that the new curriculum changes added more workloads on them. They felt exploited by working longer hours in order to cope with the work they have been entrusted to do without any extra pay. The participants complained that the educational changes have deskilled them. Consequently, their long service and the experience they have accumulated have been considered valueless and useless in their roles as educators. The HODs reported the feelings of despair and disillusionment. One participant suggested that they needed the whole year to get enough grounding in the new curriculum. The new curriculum reforms and implementation demanded new management styles; new assessments strategies; the choice of textbooks relevant for NCS; support and supervision of educators and other management duties in the school.

The participants complained that their roles were frustrating, overloading them, exhausting, making them experience plenty of uncertainties in their roles as HODs.

The HODs perceived teaching as way of preparing learners for the world of work. The curriculum reforms were perceived as imposed due to international influence. The participants reported that the imposed curriculum with prescribed performance standards and assessment standards minimize their autonomy. The HODs experienced dialectical tensions between allegiances to the subject (curriculum leadership) versus administrative role.

CHAPTER 5

DISCUSSIONS OF FINDINGS

LIFE HAS COMPLEXITIES

5.1 Introduction

In the previous chapter there were five major themes that emerged from the data. These were:

- (1) Autonomy of HODs has been minimized by educational reform.
- (2) The educational changes coerce educators to become ‘skills technicians’ and consequently degrade them as professionals.
- (3) The educational reforms create tensions between allegiances to the subject (curriculum leadership) versus the administrative role.
- (4) Educational reforms are exploiting HODs.
- (5) The educational changes position the HODs to experience polyvalent discourse.

This chapter presents an analysis and discussion of the findings and themes that emerged from the data. It will be presented using globalisation themes as organiser. In my discussion the globalisation themes might be interrelated since I have already mentioned in Chapter 2 that these themes overlap and cannot be easily separated from each other.

The New Public Management (NPM) is characterised by different globalisation themes that are related to school management and administration. I have therefore used the NPM hallmarks to frame my discussion of findings to critique the school management and administration, and democracy and citizenship focussing on the new curriculum as the major themes that have been revealed by the data. Mulford (2003) presents NPM as follows:

The hallmarks of NPM are the reduction in government's role in service provision; downsizing and decentralisation the public sector; deregulation of the labour market; the imposition of the strongest feasible framework of competition and accountability on public sector activity; explicit standards and measures of performances, clear definition of targets and indicators of success; a greater emphasis on output control – a stress on results, not processes; moves to new forms of corporate governance; a shift from public funding to private sector provision (the privatisation agenda); and a reduction in the self-regulating powers of the professions (Mulford 2003, p.8).

5.2 New Managerialism and Work of HODs

Mulford (2003) argues that the Education Department uses techniques in reducing its role in service provision through downsizing and decentralisation in schools as public sector. The new Managerialism is an element that focuses on accountability, which is about possessing expertise in performance management system (ibid). Helsby (1991) describes new Managerialism as an increased use of management discourse and technique from the private sector within education. Helsby (1991) identifies a deeper ideological process of new Managerialism, which is transforming relationships of power, culture, control and -accountability. She regards Managerialism as a strategy of controlling all public services. She views Managerialism as the governments' strategy to control and reduce public expenditure on education, which is achieved through increasing greater accountability, more efficiency and effective management.

I spend most of the time on paper work writing reports. (HOD7)

A study conducted by Helsby (1991) revealed that new Managerialism has a negative impact on educators and educator leaders. She investigated the impact of educational reforms on secondary school educators. Her study concluded that the reforms created constraints and imposed excessive bureaucratic requirements that diminished both the confidence and the capacity of educators to perform to the best of their ability (Helsby, 1991).

5.2.1 New Managerialism Exploits and Oppresses the HODs

My study has also revealed that new Managerialism has created constraints and frustration for the HODs through imposed excessive bureaucracy, efficiency and accountability mechanisms that are manifested through the reduction in government's role in service provision; downsizing decentralisation of government's power and a greater emphasis on output control. The participants mentioned that they have experienced intensified surveillance in their work. They reported that the administrative work has increased due to reports that needed to be submitted to the Department of Education compared to the 550 Nated Curriculum. HODs protested that although they were working hard the government did not offer them support, adequate training and an incentive for the hard work they have performed. One participant complained about low salaries. All the HODs complained that their workload is too much. One participant consoled himself by regarding teaching as a 'calling not work'. He uttered the following comment:

We are not paid ... unfortunately our salaries are pathetic, but eh ... to me education and teaching is a religious thing and it is good thing ... that is a difference. I believe that's giving a service ... service to the community, God and for me. At the end of the day I close my eyes - the job is well done. That's a difference. I suppose that was my motivating factor. (HOD 4.)

Some of the participants felt that they are not coping with their work. The HODs are the educators who have trained to do their jobs. The educational changes are positioning the HODs to fail to do their job. That is an evidence of deskilling. One participant mentioned that she has been serving as an HOD prior to 1994 and she was coping and enjoying her work, but now her long experience has been discarded and she was struggling to adjust herself to the new changes. HODs who want to perform are frustrated and experience constraint by the situation they find themselves in. Educators dedicate themselves to adapt themselves to serious, inexplicable conditions by comforting themselves that they

are contributing to the well being of the country. Although the HODs perceive their work as deskilling and no support provided to deal with stress; they felt they have to continue doing it because they perceive their work as service to the community.

New Managerialism came up very strongly in the data through the control, monitoring and supervision of work. The study revealed that the educational curriculum changes introduced policies that are adding more workload to the HODs. These policies were PPN, IQMS and OBE. The implementation of IQMS by the HODs has created dialectical tensions in the roles and responsibilities of the HODs. Mulford (2003) argues that new Managerialism is associated with neo-liberalism. According to Mulford the proponents of new Managerialism's new social vision view it as not exploitive, but as an efficient and a proper way of managing schools. The opponents of it regard it as an unfair labour practice that aims at oppressing, exploiting and deskilling educators including the HODs. The new social visions expect educators to understand that there are changes in the nature of social relationship as a result of transformation in the cultural or economic spheres (Robertson (2000). This perspective proposes that educators need to understand the constant changes in their workplace, and therefore adjust them to fit into the unpredictable world of work. The new Managerialism is criticised for alienating educators, disempowering them by eroding their autonomy through the intensification of their work, greater managerial control, the abandonment of the social wage and supportive labour policies, increased segmentation and management-driven flexibility (Robertson, 2000, p.130). The findings in this study revealed that the education reforms exploited, oppressed and frustrated the HODs through new Managerialism principles and practices. The HODs reported that they are expected to be administrators and developers of educators, and that adds more technical administrative duties to their workloads. The policy states that the HODs are expected to teach 85% of the load and then do administrations. One participant complained that the HODs' work takes up a 100% of their time.

The HODs carry big load because the Department of Education PPN policy does not factor in the HODs' free time to make sure that their duties - the core duties - are able to be carried off during school time. You cannot do this

after school hours. I cannot be looking, walking to educators after school hours. If the Department of Education's not work you cannot. I have to teach my class, so that is where the tension ... that is where the stress is coming. But I believe if you take your duty as an HOD ... it is 100%. (HOD 4.)

5.2.2 The Demands of New Managerialism Increases Bureaucracy through Performance Management

The NPM is characterised by explicit standards and measures of performances, clear definition of targets and indicators of success (Mulford 2003). In the South African context the new policy that has been assessed by the data that has been legislated to monitor the educators, is Integrated Quality Management System (IQMS). IQMS is a tool used by the Department of Education that monitors how educators teach, what they teach, and how well they teach. Brunton and Associates (2003, p. c-86) state that 'the aim of developmental appraisal is to facilitate the personal and professional development of educators in order to improve the quality of teaching practice and educational management' According to Robertson (2000), IQMS is a tool that highlights the shift of teaching as a profession from status profession to occupational profession. Status professionalism is described by Robertson (2000) as a realisation of cultural capital of educators in the society. The status of educators positions them to professionals with expertise that could only be legitimised in a particular way. The occupational professionalism is also explained by Robertson. (2000) as a professional aspect that is preoccupied with control on how educators teach? What they teach and how well they teach.

IQMS is a tool that is used by the Department of Education (DoE) to measure the performance of educators by setting clear targets and indicators of successful teaching. IQMS was mentioned by participants as one of the policies that they are expected to implement. According to PAM the core-function of the middle manager is to implement policies and regulations. The main function of the HODs is to monitor and control the work of educators. Therefore the HODs are managed managers. The senior management in schools deals with strategic planning that involves leadership, management and motivation. The middle management is the crucial management structures of the school,

yet its management's role is to implement strategic decisions that have been decided by the senior management. The middle managers liaise with the top management of the school and then they cascade information down to the educators.

5.2.2.1 The Performance Management Positions the HODs to Experience Polyvalent Discourse

Data revealed that the HODs are expected to 'police and to support' educators in their departments. Ball (1993) conducted a study in a number of secondary schools in the U.K on senior educators and school leaders examining school educators' work and the matrix of power relations in their schools. The study indicated that managers in schools are trapped in 'polyvalent discourse' because they both 'liberate and enslave'. Ball's argument highlights the tension and the complexity of management in schools.

This study has indicated that the HODs are experiencing dialectical tensions of both supporting and policing educators through IQMS. Therefore the HODs experience dual identities. The study indicated that the management role and the leadership role of the HODs in schools position them to experience 'polyvalent discourse'. PAM states that the core duties and responsibilities of HODs are to serve as personnel and general administrator of the Department. The HODs are part of Quality Assurance. The Quality Assurance involves the implementation of Integrated Quality Management Systems (IQMS). Whole School Evaluation (WSE) encapsulates school self-evaluation as well as external evaluation. It also provides for schools to receive advice and support in their continual efforts to improve their effectiveness. The WSE is a tool used to evaluate the effectiveness of schools and it is described as the national evaluation system that is aimed at evaluating the performance of all schools. It is a standardized tool that is used to evaluate the quality of teaching and learning in schools. The aim of the WSE is to identify schools that are performing and recognize them, and to support schools that are under-performing. The documents that I have read are not explicit about the recognition of schools that are performing above the minimum standards.

IQMS is aligned to three quality management systems, Developmental Appraisal (DA), Performance Management (PM) and Whole School Evaluation (WSE). The purpose of these three quality management systems is to advocate accountability, to avoid the duplication of work and to obtain maximum efficiency (IQMS p. 5). The document highlights that the shift in terminology from ‘inspection’ to WSE is important because it provides schools with an opportunity to receive advice and support in their endeavours to improve their effectiveness (DoE, p.7).

IQMS could be considered a good system if it is solely for support purposes and not linked to surveillance and pay. The IQMS forces the HODs to check how educators teach and detects educators’ strengths and weaknesses. All the HODs accepted their involvement in IQMS as their role since they have perceived their management role as associated with control and support. The IQMS has been used to guarantee accountability and efficiency and avoiding the duplication of work. In other words, the Department of Education is cutting down expenses on education. Instead of the Department of Education employing more people to do the job, they save money by overloading the HODs. In South Africa, before democratic education, the school inspectors used to move to all schools observing how educators teach, but now that task of observing educators is done by HODs to cut down on education spending. Data indicated that decentralization increased the work of HODs by expecting them to do more administration work.

5.2.2.2 The Performance Management Erodes the Autonomy of HODs

Codd (2005) states that education linking educators to learners’ performance erodes the autonomy of educators as professionals and results into the deskilling of educators - making them spend more time on testing and retesting. Deskilling is a term used by Kanpol (1994) to describe the educators’ circumstance when they are made accountable for the execution of someone else’ goals and plans. The participants in this study complained about time spent on testing. One participant gave the following complaint:

They decided common June exams, common September exams and they want us to write them, take 2 weeks out of June; 2 weeks out of September and take 2 or 3 weeks out of November and you have your year cut by nearly a term. So you end up teaching, having started at the beginning and have holiday. You end up having half a year to teach the whole syllabus and make a year big ... and I actually said to the headmaster I refuse to write any of these tests and at the end of the year because by then we would be ready. Fortunately, I made that decision and pushed that decision because our pupils need time to be taught not time to write exams. (HOD 1)

The above illustrates that the educators are deskilled by spending more time on testing because they end up being put under pressure to finish the syllabus. The educators are deskilled in the sense that they have been trained to do their job, but they are forced to follow the DoE's programme of testing. The schools have different learning contexts but the DoE expects them to be operating the same. The learners are also expected to acquire knowledge at the same pace, since they all have to write common tests at the same time. The common testing results in ineffective teaching because educators tend to teach learners to pass examinations instead of developing learners to be critical thinkers. The same participant gave the following as evidence of the deskilling of educators:

We experience the method kind of problem. They do not need to tell us all the same rush that we are all battling so that we all write exams. It does not work like that. I also think that the timetable comes so late that by the time it comes we had already planned our June exams for weeks. And I plan for next year during December holidays so the whole year is planned by the time we get back to school. Everything down to (the) last minute and they come in with their stuff in March. (HOD 1)

The DoE disregards the educators' planning by imposing its program on schools that is distributed late to schools after the educators have completed their planning. The imposition of the common testing is a part of the quality management system. The standardisation of testing helps the DoE to compare schools in order to reward schools that are performing. The notion of supporting schools that are under-performing is doubted because schools that are under-performing in their matric results are threatened with closure. Therefore, the support system is not clearly stated.

IQMS is perceived as a performance management system that is linked to pay. Through IQMS the Department of Education monitors how the HODs manage their departments. There is an instrument that is used to detect whether the HODs are conforming to the standards set by the Department of Education. One participant analysed IQMS like this:

This is a way of saying let me get them (HOD 4).

This particular participant viewed IQMS as an abusive tool that could be used by both HODs and the DoE 'to catch out' educators. Fitzgerald, Young and Grootenboer (2003), quote Capper and Munro (1990) who has aligned the performance management in New Zealand with a strategy of addressing public dissatisfaction about educators and their professional work. Consequently a system to evaluate the educators' performance was through performance management. The HODs are forced to participate in the IQMS because it is a policy that is applicable to all educators as stipulated in the IQMS Document (p. 4). The performance standards compel the HODs to conform to the standards set by the Department of Education. The participants complained that the IQMS was increasing their workload since they had to be DSG members of the educators they manage. The IQMS was perceived as a monitoring tool to check on educators. HODs are not in a position of being critical about the IQMS because the scores are linked to pay. The HODs are therefore infringing their "right to do critical reflections on their work as 'autonomous professionals'" (Codd, 2005, p.202).

The pay based on the performance of educators is criticised for silencing educators and therefore forcing them to fulfil the government's agenda (Ball, 2003). Gleeson and Husbands (2003) argue that improving the quality of teaching and learning through performance management system is criticised for deprofessionalizing educators and promoting cynicism. Cynicism is described as a doctrine that believes that only

selfishness motivates human actions (Stein, p. 322). That means the incentive makes the educators conform to the government's agenda.

Gleeson and Husbands (2003) argue that education worldwide has concerns about the performance of educators, learners and managers in schools. The concern is the result of connecting education to economic success. They reported that the performance management system in the United Kingdom had a negative impact on educators. Hatcher (2004) criticises the pay based on performance, like IQMS, as the government strategy to coerce educators to comply with what is expected of them and to gain the educators' commitment through coercive strategies; like awarding incentives to educators who are performing. Hatcher (2004) regards this as a way of forcing the management of schools to fulfil its agenda by making educators accountable and responsible. Consequently, pay based on performance aims at silencing the HODs, increases their efficiency and accountability. Ball (2003) argues that performativity is linked to the commodification of education. To Ball performativity is linked to productivity. The performativity principle in education reduces education to a product to be sold. Codd (2005, p.196) states that 'education is reduced to a commodity, a private rather than a public good'. (Codd, 2005,)

Codd (2005) analysed educators as managed professionals in the global education industry looking at New Zealand education system during the 1990s. The findings indicated that the neo-liberal policies promoted the marketisation of schools that resulted in the 'degradation of teaching' as a profession and led to the development of mistrust (Codd, 2005, p.193). This study has revealed that the work of HODs is frustrating, exhausting and alienating to them. The education that prepares learners for the world of work is criticised for not improving the economic growth of the country but, instead, deskills educators by degrading their professional status into skills technicians.

The HODs are therefore deskilled from perform to the best of their ability. An example of state-mandated curriculum in South Africa is OBE. The DoE (2003) stipulates Learning Outcomes and Assessment Standards that need to be covered by each Learning Area. According to Kanpol (1994) OBE is deskilling to the educators because they possess

skills for local curriculum planning and individual evaluation that are not used. The educators have less autonomy and less control over the teaching process but they have to implement what the National Curriculum Statement has prescribed. The HODs reported that deskilling adds to their frustration. Although the HODs feel that they experience problems in implementing the new curriculum they have indicated that they are compelled to follow the prescribed curriculum. “We have change that is decided on elsewhere and it’s imposed on us and we must do it” (HOD 4).

The core duties of HODs as determined by Personnel Administrative Measures (PAM) as stipulated by Employment of Educators Act 76 of 1998; are to teach, be involved in extra and co-curricular activities, personnel administration, general administrative work and communication. For effective school leadership the HODs are expected to teach and carry 85% of the teaching load in secondary school, be a class educator if required, assess and record learners. The involvement in extra and co-curricular activities could be summarised as the control of all the departmental activities that involve supporting, providing and co-ordinating the guidance of educators; developing policy for the department; and to be involved in general administration of the whole school and communication.

PAM associates accountability with the personnel duty to participate in an agreed school/ educator appraisal processes performance in order to regularly review the professional practice of educators with an aim of improving teaching, learning and management in schools. In South African education efficiency and accountability are linked to IQMS. The NPM emphasise accountability as the key element that mainly uses control as a mechanism of monitoring all the processes that involve centralised curriculum. The centralised curriculum coerces the school managers to conform to the standards set by the national government (Mulford, 2003, p. 9) by taking on the new roles and responsibilities as demanded by new policies and regulations like IQMS.

5.3 Decentralisation and the Work of HODs

Mulford (2003, p.8) describes decentralisation as a strategy of building collaborative culture with other stakeholders in education. Sayed (1997) argues that decentralization is viewed as the stated policy of most educational systems throughout the world driven by major international efforts aimed at restructuring education systems. The participants in this study associated educational reforms with social, economical and political changes. Consequently, the world organisations like the IMF and the World Bank are considered as the major international forces that have a major impact on the recession policies and education. Globalisation is often perceived as having the effects of introducing or intensifying conflict and injustice. The cut in education budgets; privatisation of education and decentralisation of education institutions are seen to be the effects of capitalism. Mendlovitz and Walker (1987) argue that political life is associated with economical, social, cultural and technological transformations that result in oppression and exploitation.

Mulford (2003) argues that through NPM the government moves to the new forms of corporate governance. The South African Schools Act (SASA) mandates the School Governing Bodies as part of the governing structure of schools. The corporate governance mandated parents to participate in the schooling of their children (Sayed, 1997). According to Sayed parents are perceived by SASA as citizens who need to pay for the education of their children. Parents are also viewed as consumers. That is regarded as evidence of the reduction in government's role in service provision in schooling. The participants associated democracy with the learners' participation in decision-making like voting for the legal prefect system in schools, representation in the management of schools decision-making in School Governing Body (SGB) meetings, and parents meetings to voice their opinions as the democratic management structure of schools. The learners therefore have been included in the governance of their schools. The participants have different understandings of the involvement of learners in the governance of schools.

Sayed (1997) examined educational decentralization in post-1994 and highlights a shift in education that is evident in the governance of schools as stipulated in The South African School Act (SASA) (Sayed, 1997). According to Sayed decentralisation is embedded in the SASA through policies and legislation that has positioned parents to participate in the governance of schools as consumers and citizens. The parents become consumers because they are constituted as the people who need to pay fees to provide additional finances beyond the state subsidy. The notion of making parents consumers in the schooling of their children leads to the marketisation of schools. Schools therefore have to compete in order to meet the demands of the parents (consumers). The marketisation of schools leads to the privatisation of schools. Mulford (2003, p.9) argues that ‘decentralisation is aligned to budgetary constraints, less time for providing leadership and instituting great increase on time demands and more attention to time management’. The participants complained about too much work that demands more time management in order to fit all what they are expected to do.

I think time is the most challenging one. But if I try to manage it very well; but I sometimes find that everything fits, like coming to school early, helps with whatever that has been left behind. Ours is not just to go to the classroom only. The extra mile that you were talking about; so you have to create. Sometimes I come in early before the educators and learners are here so that you can be able to sort yourself out; the examinations things that need to be sorted out prior. When the educators get here everything is just ready. Again, the same thing applies to the afternoon. Sometimes we are left behind so that you can sort things for the next day. Time is just my biggest challenge. (HOD 2)

I am talking about 10 years down. I think HODs had much more freer lessons. An HOD would have like we have a calendar of 7 lessons a day. The HODs would sit with 3-4 lessons not teaching, which helped a lot us. If you can look at my (pointing at the time table) those days, the minimum and maximum free I have a day is one. The maximum free period is one; so you understand the real impact. How do people work after school hours? I also coach. Where do you have time? (HOD 4)

The participants felt frustrated by the new policies that have increased their workload. As a result the HODs felt exploited since they were not paid according to the workload they had. One participant expressed dissatisfaction about the salaries given to HODs:

I cannot talk for most of them, but frustration is a major part in this. Frustration in terms of salary which is not in the equal par with what management should have. This frustrates people who want to perform. The workload has become more intensified in terms of what we have to carry, more duties in terms of teaching within the classroom compared to HODs of the past. The bigger classes we have and the support from the Department is little. (HOD 4)

The Department of Education has decentralised its power to assess learners by making schools accountable and responsible for the assessment of learners. Educators who are school-based do the external examination of learners. Data indicated that school-based educators are also serving as examiners. One participant reported that school-based educators are also examiners: “I have a friend who is an examiner” (HOD 4). Therefore school-based educators are occupying two posts: the teaching post and the examiner post. This is done to minimise spending on public education. The HOD who manages an educator who is serving in two posts is difficult. What happens when the educator is away? Who organises the supervision of classes that are without educators? Based on what the participants have witnessed, I therefore argue that decentralisation exploits the HODs by making them work longer hours without an extra pay.

Data revealed that educators have experienced non-democratic practices in their work. The participants felt oppressed by hierarchy in the Education Department. “We have change that is decided on elsewhere and it’s imposed on us and we must do it” (HOD 4). The participants expressed that they were experiencing oppression from the Education Department. The evidence of oppression was the imposed changes through the NCS. The participants mentioned that there was no democracy in schools. The HODs complained that they have minimal power to control the curriculum. The Department of Education is viewed as oppressive to the HODs.

5.4 Efficiency and Accountability are Exploiting and Frustrating HODs

Efficiency and Accountability are an indication of greater emphasis on output control, with the emphasis on results and not processes (Mulford, 2003). The HODs experienced

constraints in the discourse of new Managerialism that is characterised by control, efficiency, accountability and productivity. The notion of control led to the centralisation of the curriculum. The HODs reported that the centralised curriculum was deskilling them. They complained that they had to rush to finish the syllabus after a lot of time has been consumed by common testing. Leithwood, et al. (2002) are quoted by Mulford (2003) criticising centralised curriculum by arguing that it leads to disastrous and unintended consequences that include minimising differences in learners; reduces instruction focussing on testing and test scores that eventually leads to competition between schools. Therefore the HODs are exploited, working longer hours without an extra pay.

The new Managerialism results in the introduction of new roles and responsibilities that are adding more to the HODs' workload. Data indicated that the curriculum changes introduced centralised curriculum. The participants complained about the implementation of changes that have been imposed on them "I also think that our schools experience is not democratic system from the Education Department" (HOD 1). Although the Department of Education is claiming that it promotes democracy and citizenship in education, yet the HODs experience oppression and exploitation. The centralised curriculum makes efficiency and accountability more feasible. It is easier to compare the performance of schools, educators and learners if they all have a centralised curriculum. The standardised testing is part of quality management system. The participants reported that the performance management reduced their autonomy and coerced them to conform to the standards set by the National Education.

Data indicated that the curriculum changes were making HODs experience frustration and oppression. They complained that the changes have added more to their workload, responsibility and accountability as HODs. As one of the subject put it: "I would rather be a Level One without responsibility" (HOD 4).

According to this statement the level of responsibility in HODs has mounted compared to the post level one educator. One of the responsibilities mentioned by the HODs was the pressure to finish the syllabus. The participants were frustrated because they are the people who are supposed to interpret and implement the curriculum but to them that is a challenge. There are three levels of management in schools. There is senior management (principal and deputy), middle management (HODs) and low level of management (educators). The senior management in schools deals with strategic planning that involves leadership, management and motivation. The middle management is the crucial management structures of the school. The middle management's role is to implement strategic decisions that have been decided by the senior management. The middle management liaises with the top management and cascades information to the lower management structure, in this instance the educators. The core-function of the middle management is to implement policies and regulations (PAM). The middle management should plan following the grand plan of the whole school since the middle management is responsible for the implementation of policies.

The government spending on education has shifted the responsibility of assessing educators to the HODs. During the apartheid education in South Africa the inspectors employed by the Department of Education were doing class visits and compiled reports about the educators. That was a way of monitoring educators. That responsibility of monitoring educators has been shifted to the HODs as the immediate supervisors of educators and SMT members in schools. Class visits are done by the schools through Integrated Management Systems (IQMS). The HODs as immediate supervisors of educators form part of the educators Development Support Group (DSG). The DSG is a panel of educators that are responsible for the assessment of how an educator teaches at school level. The Department of Education does not only make HODs responsible for IQMS only, but Continuous Assessment (CASS) has also been made the responsibility of the school.

The new curriculum emphasizes Continuous Assessment (CASS) that is monitored by the school. CASS is encouraging accountability and efficiency. The educators are

accountable to the parents for the education of their children. The Department of Education has shifted the responsibility of being accountable to parents by making educators accountable. The HODs are therefore accountable to the parent, principal and to the Department of Education.

5.5 Flexibility in Education Coerces the HODs to be Multi-skilled

Mulford (2003) argues that the NPM is characterised by downsizing. Data indicated that the participants experienced downsizing in their schools. The participants mentioned that there are policies such as the Post Provisioning Norms (PPN) policy that aim at downsizing the educators in their schools. One participant criticised the PPN policy as having ‘poor factoring’ (HOD 4) since it does not cater for the time allocated to HODs to have free lessons. That means PPN is overloading the HODs through the process of downsizing. One participant showed dissatisfaction about PPN and said:

The HODs carry big load because the Department of Education PPN policy does not factor in the HODs’ free time to make sure that their duties, the core duties, are able to be carried out during school time. You cannot do this after school hours. I cannot be looking, walking to educators after school hours. I have to teach my class so that is where the tension and the stress is coming. But I believe if you take your duty as an HOD... it is 100%. (HOD 4)

Downsizing forces the HODs to be flexible, multi skilled and being able to manage subjects that do not fall under the area of their specialisation. Although some of the participants are not familiar with the subjects they manage; they are responsible for the management of those subjects.

As an HOD I am involved in providing support in the case of subjects that I don’t teach myself. I wouldn’t personally support them in terms of the syllabus and the subject matter, but if I needed help I would, I would find somebody to help them I would refer them to the subject advisor or make sure that somebody else from the staff would help them. For example, in Maths, which I don’t teach, I would find assistance in terms of the content, but if it is in terms of discipline matters or planning or administration issues within the school, then I would obviously support them. (HOD 7)

The Government Gazette, Volume 443 of 31 May 2002, states that the revised National Curriculum Statement encapsulates educators and learners who are knowledgeable and multi-faceted, sensitive to environmental issues and able to respond to and act upon the many challenges that will still confront South Africa in the twenty-first century.

The government gazette highlights that educators need to be the multi-faceted. That means the educators need to be multi-skilled. The deployment of multi-skilled workers increases competition amongst workers. Workers could be paid depending on their performance on market demand. An example of this in South African Education is the proposed incentive to be given to educators who are offering scarce subjects because they are on high demand. Kanpol (1994) argues that the multifaceted identities in education are the results of modernism and postmodernism.

Kanpol (1994) aligns modernism with capitalism as an ideology that perpetrates individual competition in the free market. Capitalism as the world economic ideology influences the links between education and the world of work. Therefore, the role of the school is to prepare learners to compete in the global world of work; 'tracking learners to fit in the work force' (Kanpol quotes Oakes 1985). Robertson (2000) critiques the flexibility model by highlighting that it propagates the capitalist ideology and enhances inequality amongst workers. This study indicated that HODs experienced ambivalent discourse when they were caught in the dialectical tensions of being curriculum leaders and administrators in their management role. The HODs showed more allegiance to their subjects than administrative role. The new curriculum changes demanded the HODs to be multi-skilled and manage subjects that do not fall under their subject specialisation. The HODs suggested that each and every subject needed to be managed by its subject specialist. Flexibility leads to the job contestation for educators.

Competition coerced the South African Education System to consider giving heed to subjects that are encouraging technological advancement in education. These new subjects are Maths Literacy, Computer Applications and Technology. The introduction of

new subjects creates multiple regional markets that encourage technological skills in education. This study has indicated that the technological skills in education help the learners to compete in the global job market.

South Africa is compared to other nation states in mathematical ability, yet different nation states have different social, political, economical and cultural problems. This is done without taking into cognisance that nation states have different problems. The plan calls on most institutions to limit their intake in the humanities, which include arts and social sciences, in favour of fields such as business, engineering and technology. This means school have been targeted by the Minister of Education to be centres of Science and Maths

The South African education witnessed contestation in the teaching profession when, for the first time in the history of South African education, teachers experienced unemployment. Robertson (2000) argues that the internal flexibility refers to the deployment of multi-skilled workers to other sites within the workplace. This is also another way of minimising costs. The deployment of multi-skilled workers increases competition amongst workers. Workers could be paid depending on their performance on market demand. An example of this in South African Education is the proposed incentive to be given to educators who are offering scarce subjects because they are in high demand. This is also another way of minimising costs.

In conclusion new Managerialism is alienating to the work of HODs in schools. McLaren (2003) suggests that school leaders should perceive themselves as the agents of change, adopting critical pedagogy as a way of challenging the status quo in education. The solution suggested to counter attack new Managerialism in schools by the adoption of distributive leadership in the management of schools. The adopting of critical pedagogy in education equips the management of the school not to collude with oppressive policies from the Department of Education and empowers the management to be critical. Hatcher (2004) suggests that critical education management theories need to be adopted in order to challenge and reject neo-liberal policies in education. McLaren (2003) and Hatcher

(2004) propose that the management in schools should understand the political and economic context they work under and re-examine their own collusive professional cultures by developing a proactive resistance to oppressive policies and regulations from the Department of Education. Hatcher (2004) suggests that the 'proactive resistance' by school leaders could challenge Managerialism in schools. One participant reported that she influenced her school principal to resist the writing of common tests. Hatcher proposed distributive leadership in schools as a solution to Managerialism that impacts negatively on the HODs. McLaren (2003) suggests that school leaders should be critical and challenge all oppressive policies that are imposed on them. Mulford (2003) states that the influence of NPM under the restructuring of public schooling is characterised by decentralisation through school self-management; the injection of competition between schools; greater demands for financial accountability; an increase in consumer control through school governing councils; recentralisation of curriculum and assessment control; expanding the powers of school principals; increasing pressure for outcomes based assessment; the exposure of school performance to public scrutiny; the assessment of educators against employer defined competencies; and tighter regulation of the teaching profession (Mulford 2003, p. 8).

I therefore argue that new Managerialism has reduced the autonomy of HODs by forcing them to collude with policies and practices that are oppressive to them. Davies (2003) argues that new Managerialism removes the locus of power from the professionals, promotes compliance and destroys the eagerness to critique policies and practices. Davies criticises new Managerialism for instilling individualism in professionals. Data revealed that the participants were competing as HODs of various departments. One participant viewed a subject as a product to be sold. "What else can I sell? It's my product that's why I live my subject. I am my subject. I cannot sell somebody else's product" (HOD 2). I have alluded to the fact that NPM demands entrepreneurial skills and salesmanship in the HODs.

5.6 Universalisation and Accreditation Impacts Negatively on the Work of HODs

Edwards and Usher (2000) argue that the impact of globalisation on curriculum deals with matters that need to be covered in learning with an aim of enabling learners to engage as global citizenship or consumers. Chidester (2003) argues that the concept of citizenship has been undergoing dramatic transformations through the transnational initiatives that have been organised locally and globally. According to Jackson (2003) global citizenship claims that all citizens have transnational identities that cut across the boundaries of the states. He goes on stating that global citizenship has become an essential component of citizenship education to prepare learners for the globalizing world. The introduction of new subjects such as Mathematics Literacy, Computers and Technology in the new curriculum is associated with democracy and citizenship. The participants reported that South Africa needs to address the issue of scarce careers that can benefit the country. The scarce careers were associated with Maths and Science.

Gough's (1999) argument about the impact of globalisation on the curriculum policies was evident in the data when the participants associated the introduction of Mathematics and Mathematical Literacy as compulsory subjects to all learners. The participants were against the idea of making Mathematics and Mathematical Literacy compulsory to all students due to the shortage of qualified Mathematics educators.

Ya, in terms of the Department change that every child must do Maths; I feel that is very good; but I think it is a kind of very noble idea; great idea; but it is introduced to any class that does not have any qualified Maths educators to take those. The Department has now got programs like ACE; now they do Maths and Maths Literacy for educators. I think change the program they will making new policy now they are implementing it they are getting new educators or get educators to teach educators how to teach Maths Literacy especially 2 years ago. But we want to impose now. They are implementing where every child does Maths as from now but want to implement it now. Those educators are learning and at the same time they are also trying to teach in classrooms. Some educators told me, some of

them told me that some of them are totally disorientated when it comes to subject matter because they have been teaching in the GET phase and now they are teaching in the FET phase. So we feel we need students' breaks to talk to the educators. (HOD 4.)

The above statement highlights that the changes are detrimental to the HODs. The HODs are expected to manage and support educators who are struggling to understand the content of their subjects. The management and support of the educators is adding more to the workload of the HODs. Unfortunately the HODs have to account to the DoE about the high failure rate in these subjects. The DoE has no alternative but to adjust themselves to the globalisation demands. Globalisation is perceived as transforming schools through the introduction of new information technologies and new curriculum and condoning 'global education' which is criticized for propagating 'new imperialism of economic globalisation' (Gough, 1999, p. 78).

Globalisation challenges the nation states to open their borders and prepare its citizens to compete locally and globally. Liberal democracy adopts neo-liberal policies that acknowledge the universality of Human Rights. The universality of Human Rights adopts the concept of global citizenship to all nation states that are democratic. Global citizenship is aligned to the liberal democracy, which is dominated by economic rationalistic tendencies (Pitt, 1998). The interconnectedness influenced by globalisation propagates the market related curriculum in schools. Lechner's (2004) World Polity Theory has highlighted that there are world organisations which set universal rules that are applicable to all nation states that share common frameworks where the issues and the concepts of 'global citizenship' are decided. To Lechner the global economy has demanded rapid restructuring of education; where steady jobs for well-disciplined and performing students are disappearing, while new jobs in the high-tech sector are emerging (ibid, p. 62). Education that prepares learners as 'complaint work force' that would gain skills of print literacy and discipline in order to fit in the modern corporations and a corporate economy has detrimental effects on educators. Codd (2005, p.194) argues that education aimed at making learners to acquire the skills that could make them

productive ‘within the changing global labour market’ results into the degradation of teaching as a profession.

Studies that have conducted on the curriculum currently used in South Africa revealed that curriculum in South African Education have been associated with international developments. Jeevananthan (1998) conducted studies in South Africa looking at the curricula currently in use in South Africa. He argues that curriculum in South Africa is irrelevant and is based on two accounts; curricula being Euro centric in nature and the other being the fact that content selection is based on dominant class experience and cultural forms. He concluded that content selection for curricula in South African schools is limited to dominant class experiences and cultural forms. He stated that the system used in South African education excludes learners from poor socio-economic background. My study is not focussing on the curriculum studies as I have mentioned earlier, but data in this study revealed that the new curriculum is Euro centric in nature. One participant expressed discontent about the international developments that are destroying the countries’ national culture:

We adopt things which do not fit into our culture. International developments are not good for us because they destroy our national culture. The Americanism is attracting younger people but we need to be more proud of being South Africans. We need to be more proud to come to the South Africa culture. South African culture needs to be protected.
(HOD 1)

The above shows that international developments destroy the national culture of the nation states. Lechner (2004) argues that World Polity Theory coerces nation states to import symbolic educational reform via national policies and control systems that result in the nation states not enjoying state sovereignty; instead they import education policies that make them compete internationally.

The participants were asked to comment about the international developments that might affect South African Education. The participants mentioned different programs that have

been adopted from other countries. The participants mentioned Outcomes Based Education (OBE), Occupational Specific Dispensation (OSD) and Technological advancement. One participant mentioned that there is a demand for technological advancement in order to comply with global science:

Whatever, but the lack of resources has a great demand, especially with advanced demand of technology, of course, the level of education we execute because somewhere it does not comply with global science? I don't know whether you have heard that the last time they assessed the mathematical ability of our learners we came last including some of the African countries. (HOD 7)

The account of this participant is highlighting that there is competition in education internationally. Torres (2003) argues that 'globalisation from above' calls for the demolishing of the wall between nation states, creating multiple regional markets and encouraging technological, economical and financial exchanges internationally. The participant draws our attention to the fact that that South Africa is compared to other nation states. This is clear evidence of competition in the global market world that is associated with globalisation.

One participant appraised the technological advancement for being an effective system of sharing ideas locally, nationally and internationally. The Internet was perceived as international developments that benefit schools. He reported that the Internet was making communication much easier.

Our education adopts things like OSD from Britain. Are the adopted things successful like in those countries? (HOD 3)

The participants raised concerns about programmes that have been practiced in other countries and that have been adopted by South African Education. They complained that the international programmes do not fit the South African context. The adoption of OBE was one of the examples of programmes that were criticised. It was criticised because it is

the curriculum that has been adopted from other countries and not adapted to suit our country. The participants reported that OBE demands fewer learners in class, enough resources to facilitate the lessons, which are a challenge in South African schools. The international developments were criticised for forcing educators to prepare learners for the world of work.

5.6.1 Universalisation and Accreditation are Linked to Neo-liberalism Policies that Coerce HODs to be Skills Technicians

Torres (2003) argues that Universalisation and accreditation are some of the globalisation themes that could be associated with national economies' enforcement on education, through structural adjustment policies. Universalisation in this study is linked to democracy and citizenship. The issue of global citizenship calls for the Universalisation of curriculum and the accreditation in education. Universalisation and accreditation link education with the global world of work. Torres (2003) states that globalisation is framed by an ideology of neo-liberalism that promotes the free market system. According to Chidester (2003) global citizenship claims that all citizens have transnational identities that cut across the boundaries of the states. He goes on stating that global citizenship has become an essential component of citizenship education to prepare learners for the globalizing world. Mortimore (2001) argues that the issue of global citizenship give all the citizens a chance of being appointed anywhere in the world.

Davies (2003) associates new Managerialism with neo-liberalism. Pitt (1998) argues that the neo-liberal policies propagate new economic order that rejects the socio-cultural order for the promotion of the economic order. Capitalism is an economic system where there is an accumulation of capital through exploitation of workers. Capitalism is shaped by the ideology of neo-liberalism. Neo-liberalism imposes to the whole world policies that have detrimental effects on education. Therefore, the economic order degrades the equality and humanity of educators in favour of a free market system. The neo-liberal reforms ignore the issue of social, political and cultural factors and concentrate on the economic factor.

There is a tendency to link education to economic growth. Wolf (2002) denies the correlation between education and economic growth by stating that there is dearth of evidence supporting it and control through the increased accountability and responsibility in the form of coercion, so that quality assurance is guaranteed.

Kellner (2003) argues that the neo-liberal policies in education associated with globalisation prepares learners for the world of work. Data revealed that the HODs perceived schooling as a vehicle of preparing learners for the world of work. In Chapter 4 all the participants perceived Maths and Science as important subjects in the curriculum because these subjects were viewed as ‘doors to many faculties of education’ (HOD 2). The participants associated Maths and Science with the world of work. The participants even stated that learners are pressurised to do these subjects due to the global demands. The importance of Maths and Science has become the major focus of the South African National Education Department. Kahn (2001) reported that the South African Education had to turn the education system around by employing Human Resource Development Strategies that could improve skills development through accelerated skills development programs in critical areas such as Mathematics, Science and Technology (M S & T), in order to compete in the global competitive economy. The HODs sounded positive about the promotion of Maths and Science in schools, but they raised concerns that learners who are not capable of doing these subjects are pushed to do these subjects for the benefit of the country.

They are giving it status and knowledge according to my experience; but some few learners; but I’m talking about majority don’t, but the minority, some few learners love it because they know the implications of having it. On the side of the department of science they give it that status, big status. Then why I think the second reason of the second question was why. The reason why the Department is doing so because the Department is trying to promote it for the benefit of the country because the Department is paying so much money for the education of a child in the country and they want to see it bearing fruit. So bearing fruit means we’ve got people who are capable to do things and qualify to do things that are not normally done by people in our country because our country seems to be lacking in technology, in Maths and Science skilled working class people with no

skills. People do not have skills, knowledge so they import knowledge and skills from other countries. (HOD 8)

It is through structural adjustment policies that the context of the educators' workplace changes. Robertson (2000) highlights that education in different countries has been associated with the changing context of educators' work place. Robertson (2000, p.100) argues that 'the status of educators as professionals has shifted from status profession to occupational professionalism that is preoccupied with control of labour, looking at how educators teach, what they teach and how well they teach'. The adoption of structural adjustment policies in education has increased surveillance in education. McLaren (2003) argues that the neo-liberal approaches lead to surveillance, reduced educator autonomy and increased more social inequalities in education.

The notion of linking education to the world of work results in surveillance in education. Surveillance intensifies efficiency and accountability in educators. Efficiency and accountability lead to the development of mistrust between educators and HODs. The HODs have to closely monitor and supervise the educators to be productive and force educators to provide evidence of their work. Control and accountability are the Managerialism principles that are used to monitor the work of educators. The educators had to be managed so that their productivity could be improved and measured through tests, examination results and the performance of learners. The professionalism in educators is eroded by the culture of surveillance.

5.7 Privatisation of Education Impact on the Work of HODs

Privatisation and competition coerces the HODs to be multi-skilled. Robertson (2000) argues that the new social visions view capitalism as not being exploitive since it is the way of understanding the changing nature of social relationship as a result of transformation in the cultural and economic spheres. The new social visions believe that workers should fit into the world market. The constant change in workplace is interpreted as the way of fitting into the market world.

Consequently, the relationship between educators and state is that educators are expected to fulfil the governments' agenda of preparing learners for the world of work. I have alluded to the fact that that deskills educators. Hatcher (2004, p.1) states that adoption of neo-liberal policies in education 'transforms the schooling system from a social democratic to a neo-liberal system whose primary objective is the production of human capital for economic competitiveness'. Therefore the central reason for education focuses on the acquisition of skills for the job market rather than equipping each and every learner to be a citizen who upholds individual rights. Hatcher (2004) argues that the neo-liberal policies in education challenge the 'old bureaucratic-professional system of management' in schools to 'performativity' (Hatcher, 2004, p.1). Therefore the new management principles aim at coercing educators to perform up to a certain standard set by the government. The new management principles intensify efficiency and accountability in the management of educators.

Codd (2005) highlights that privatisation of education contradicts with the aim of democratic education that states that all learners should have equal access to education. The World Economic System is criticised for promoting and imposing undemocratic processes to national governments (Lechner, (2004). This world economic system does not guarantee equal access to quality education.

The contending views against this theory states that the new capitalist economic system erodes the national democracy and sovereignty of states by imposing neo-liberal policies on nation states and, eventually, perpetuating social inequality. This means the adoption of neo-liberal policies in education leads to the privatisation of education those results in the cut in education budgets. Privatisation of education and decentralisation of education institutions are seen to be the effects of neo-liberal policies in education.

If education is perceived as a product, then citizens who need it have to pay. Codd (2005) argues that the adoption of the neo-liberal policies in education results in unequal access to education. The reduction of education to commodity results in the deskilling of

educators. The educators' right to do critical reflections on their work is infringed and their work as 'autonomous professionals' is eroded (Codd, 2005, p.202). Bruinages (2006) argues that curriculum should equip learners to question, examine and critique knowledge and its applications instead of being passive recipients of knowledge. The educators are therefore expected to play a vital role in designing, developing and delivering curriculum that is based on professional judgement and creativity. Educational reforms based on the preparation of learners for the world of work are deskilling educators and streamlining their careers to skills technicians. Codd (2005) argues that the deskilling of educators is degrading teaching as a profession.

Capitalism is shaped by the ideology of neo-liberalism. Neo-liberalism supports the 'free market' system that calls for an opening of borders to fast track the national and international economic technological and financial exchanges. Lechner (2004) argues that the capitalist world economic system is perpetrated through 'structural based' political systems that resulted in a new economic paradigm shift to the promotion of Meta-capitalism worldwide. Meta-capitalism is defined as capitalism that promotes technology 'the new electronic age'. The new electronic age is associated with world technology.

One participant regarded subjects as products to be sold.

Learners will easily spot that you are not comfortable with science they would feel uncomfortable as well. So if you are comfortable prepared at all times selling your subject, you will live your subject, you are just your subject and learners will be interested (HOD 2).

Educators are therefore perceived as producers. In business terms there should be managers, the product and consumers. If the subject is perceived as a product an HOD would play a role of being a production manager, with parents and learners as the consumers. Since there is this perception that schools are producing products; therefore schools are going to compete in their job market. If education is treated like a product, then it would be in high demand - definitely only a few people would have access to it.

The price of education depends on supply and demand, like all businesses. The notion of the privatisation of education is elicited by the understanding that education is a commodity. If education is perceived as a commodity; then that understanding leads to the marketisation of schools. The 'commodification' of education suggests that education should be privatised (Apple, 2001; Roberts 19989, Ball, 1993; Edwards and Usher, 1997). Therefore the relationship at school level changes, the learners and parents become 'consumers' in the education field where they have to buy education.

The system of 'commodifying' education excludes learners from poor socio-economic backgrounds who cannot afford to buy education. In South Africa we have private schools (schools that are not state funded) and public schools (schools funded by the state). The parents who can afford to pay more for the education of their children have a wider choice of schools, unlike poor parents who have no choice. The implication of the privatisation of school is that quality education is no longer a human right, but accessible to those who have money. This means not all learners have equal access to quality education. The privatisation of education introduces us to the competition as the globalisation theme.

5.8 Competition Leads to the Contestation for Jobs

Competition in education could be analysed using Torres' (2003) 'globalisation from above' and by Lechner's (2004) World Polity Theory. According to Torres' 'globalisation from above' it calls for the demolishing of the wall between nation states, creates multiple regional markets and encourages technological, economical and financial exchanges internationally. Globalisation as a world polity theory presents a basic understanding of how education competes in the global world. Carnoy (2000) cited in Torres (2003) highlights that the quality of national education systems is compared to other nation states globally. Oplatka (2004) argues that schools compete in order to conform to the standards set by the parents (consumers). The system is disempowering to both learners and educators. The teaching methods associated with progressivism are

under attack therefore, educators 'teach to test'. "...Our pupils need time to be taught not time to write exams" (HOD 1). The participants criticised the DoE for imposing the programs that spent time on testing rather than teaching. The DoE uses testing as a way comparing the performance of schools. The educators are therefore forced to comply since their performance is based on pay as I have alluded to above.

Competition happens where there is contestation for scarce resources. Contestation for jobs in schools is based on competition. Contestation could be best depicted in a situation where people contest for fewer resources. Contestation in education transforms teaching as a professional work into an ordinary job Codd (2005). Codd (2005) quotes Codd (1991) who argues that the contestation of the job in teaching reduces educators' autonomy. The autonomy of educators is reduced by the liberal policies that are encouraging 'hyper individualism' (Pitt, 1998, p.3). "What else can I sell? It's my product that's why I live my subject. I am my subject. I cannot sell somebody else's product" (HOD 2). This indicates that the participants are concerned about their performance in their subjects. The HODs' concerns about the performance in their subjects have created allegiance to their subjects. Although the HODs understood that should be managing all the subjects equally as managers, they showed allegiance to their own specialisation subjects. The HODs' allegiance to their subjects is condoned by intra-school competition. According to Pitt (1998) education aligned to liberal democracy, puts more emphasis on 'individualism'. Pitt (1998) argues that 'hyper individualism' esteems individual rights, competition and individual achievements. Where there is competition, individual rights and individual achievements are bound to be contested (Pitt 1998).

5.9 Conclusion

I can conclude this chapter by highlighting that all the globalisation themes and theories have been illuminated by the data. I therefore argue that education reforms in South African education are linked to globalisation. The participants witnessed that educational reforms associated with globalisation have detrimental effects on their educational lives

and work as HODs. They reported that the education reforms have created constraints and imposed excessive bureaucratic requirements that oppressed and deskilled HODs. The findings indicated that educational reforms linked to globalisation have increased the workload of HODs, deskilling them and exploiting them through the new Managerialism. Globalisation has been identified as the strategy of meta-capitalism through imposed neo-liberal policies. The intensified accountability and efficiency in education are the results of government's strategy to reduce public spending on education by exploiting educators including the HODs.

The study has highlighted that there is a definite relationship between the state and educators. The 'polyvalent discourse' experienced by the HODs in this study could be analysed as evidence of the complexity of the relation between educators and the state. Robertson (2000) gives us a word of caution that the relationship between educators and the state is complex; therefore it should not be analysed uncritically.

Chapter 6

SUMMARY, LIMITATIONS AND RECOMMENDATIONS

6.1 Introduction

The aim of this chapter is to conclude this study by summarising the findings, making recommendations, outlining the shortcomings of the study, and proposing areas for further study. I have structured this chapter by summarizing the key findings of this study; stating the limitations of the study and presenting recommendations for further studies.

6.2 Summary of the Key Findings

The findings suggested that the educational reforms were linked to globalisation since most globalisation themes emerged from the data collected. Data has revealed that reforms linked to globalisation were alienating to HODs. The findings in this study suggested that the educational reforms minimized the HODs' autonomy as trained educators who are skilled to do their job. The HODs felt that the new curriculum has deskilled them by designing Performance Standards and Assessment Standards that have been imposed on them as a policy to be implemented by all educators. Consequently, their autonomy as trained educators who are skilled to teach learners has been minimized. Codd (2005, p.202) argues that educators are 'autonomous professionals' who need to be trusted that they can do their work successfully and efficiently. Codd (2005) argues that the professionalism of educators is crippled by the neo-liberal policies that propagate new managerialism, accountability and efficiency which arouse the culture of mistrust. Codd (2005) quotes Hazeldine (1998, 216) who gives a word of caution that 'people who are

not trusted tend to be untrustworthy'. Therefore, the new curriculum leads to the deskilling of educators.

Codd (2005) suggests the restoration of the culture of trust in education through the culture of accountability that recognises the ethical obligation of teaching as the profession is based on moral agency. That means educators need to be motivated to be committed, loyal and have a sense of duty that is not based on control through legislation but cultivated by the culture of trust that promotes ethical conduct in educators (ibid.).

The findings are displaying contradictions between aims of democratic education and the implementation of new policies. According to the Department of Education (2007) the intention of democratic education in South Africa was to emphasize greater professional autonomy in educators. My findings has highlighted that the autonomy of educators has been minimized. That means the research findings are revealing a paradox in the sense that the government's intentions of emphasizing autonomy to educators is contradicting the government's intentions of democratic education. Data revealed that there is no democracy in schools; starting from the government, to school leaders, and trickling down to the learners

The HODs mentioned that the neo-liberal reforms have coerced them to prepare learners for the world of work. That means the curriculum reforms have made the HODs become 'skills technicians'. Therefore their professional work as educators has been degraded. Codd (2005) argues that education that prepares learners to be a 'compliant workforce' is deskilling educators since it restricts them to teach learners to pass examinations, instead of training them to be critical reflectors.

The findings also suggested that the educational reforms have made the HODs experience dialectical tensions between their allegiances to the subject (curriculum leadership) versus administrative role. The participant highlighted that the educational reforms were exploiting them since they had to manage subjects even though they were not subject specialists of those subjects. The participants suggested that the Department of Education

needs to ease the load of HODs by separating the administrative role and curriculum leadership, since it has positioned the HODs to experience 'polyvalent discourse'.

6.3 Limitations

The research findings in this study cannot be generalised. There are two main reasons for the limitations of findings in this research project. The first reason is that qualitative research using case study cannot generalise its findings, due to the small scale of the sample. Another reason is that research conducted on the impact of educational reforms that are linked to globalisation on the professional lives and work of educators is very complex. My study has investigated the affect of educational reforms on the work and professional lives of HODs by investigating their perceptions of education reform in schooling. There are a number of aspects that have not been researched which can also impact on the work and professional lives of educators in middle management. Torres (2003) argues that globalisation is far too complex to be presented in a simple formulaic manner. Therefore further research needs to be conducted.

My study investigated the perceptions of HODs on their new roles and responsibilities in light of education reforms in the context of globalisation. Another dimension, which we, as researchers, need to take cognisance of, is the fact that human beings are dynamic. What is applicable to one person might not be necessarily applicable to another person. This point is more aligned to the generalisation of findings that I have already alluded to.

My research has concentrated on a few policies that are detrimental to the professional lives and work of HODs. There are so many policies that have been introduced in South Africa education since 1994. As a result I cannot claim that all policies that have been introduced are detrimental to the lives and work of HODs by making inferences based on PPN and IQMS. What I can conclude, is the effect it has on the work and professional lives of HODs based on their perceptions and experiences of education reform.

I must also confess that while I have used the globalisation themes as part of my conceptual framework to analyse and discuss my findings, making the link between education reform and globalisation has proven to be far more complex than anticipated. With that said, I do believe the study has identified significant connections between the two, although not explicated in terms of cause and effect.

6.4 Recommendations for Further Studies

My research has concentrated on few policies which were identified by participants in terms of their effect on their roles and responsibilities. Further research needs to be conducted on how specific policies that have been introduced have impacted on the professional lives of educators across levels. The context and site of the research were the schools that were close to the city, as I have mentioned earlier in Chapter 3. If the sample had included a larger number of schools and across different contexts, such as rural areas, the research findings might well have been different or might have highlighted further issues in terms of the changing roles and responsibilities of HODs.

Hence, the following are some recommendation:

- The same research is conducted across contexts including a larger sample.
- Research is conducted on the roles and responsibilities of school managers in respect of the introduction of policies on performance management.
- The professional development of educators in the context of education reform needs further investigation following the sentiments expressed by participants in terms of their lack of preparedness, knowledge and skills to implement policies.
- Research is conducted which investigates specifically the effect of neo-liberal globalisation on education.

6.5 Conclusion

I conclude by suggesting that the neo-liberal policies that are linked to globalisation are alienating to HODs. Therefore, educational reforms linked to globalisation are oppressive since they emphasize the culture of control and surveillance that cultivate the culture of mistrust and restrict professional autonomy in educators. Consequently, the HODs need to be actively involved in empowerment programmes that would encourage them to be critical in their praxis as curriculum implementers. The HODs' critical stance would help them not to collude with oppressive policies that are cascaded to schools from the Department of Education.

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APPENDIX A
Ethical Clearance



Thursday, March 15, 2007

Faculty Research Committee
Faculty of Education
Edgewood Campus
University of KwaZulu-Natal

Dear Dr Green & Ms Sader,

Consideration of Ethical Clearance for student:

Hina, Ellah Hendriatta Ziningi - 203520116

Your student's ethical clearance application has met with approval in terms of the **internal review process** of the Faculty of Education.

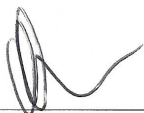
Approval has been obtained from the Faculty Research Committee, and the application will be forwarded for submission to the Ethics Sub-Committee of the University of KwaZulu-Natal.

Both you and the student will be advised as to whether ethical clearance has been granted for the research thesis, once the Ethics Sub-Committee has reviewed the application. An ethical clearance certificate will be issued which you should retain with your records. The student should include the ethical clearance certificate in the final dissertation (appendixes).

Should you have any queries please contact the Faculty Research Officer on (031) 260 3524 or on the email buchler@ukzn.ac.za.

Yours faithfully





pp Professor R. Moletsane
Deputy Dean Postgraduate Studies and Research

APPENDIX B

Permission To Conduct Research



PROVINCE OF KWAZULU-NATAL
ISIFUNDAZWE SAKWAZULU-NATALI
PROVINSIE KWAZULU-NATAL

DEPARTMENT OF EDUCATION
UMNYANGO WEMFUNDO
DEPARTEMENT VAN ONDERWYS

Tel: 033 341 8611
Fax: 033 341 8612

Private Bag X9137
Pietermaritzburg
3200

228 Pietermaritz Street
Pietermaritzburg, 3201

INHLOKOHHOVISI

PIETERMARITZBURG

HEAD OFFICE

Enquiries:
Imibuzo: M Francis
Navrae:

Reference:
Inkomba: 0266/06
Verwysing:

Date:
Usuku: 07/05/2007
Datum:

RE: PERMISSION TO CONDUCT RESEARCH

TO WHOM IT MAY CONCERN

This is to serve as a notice that Dr WJ Green, Ms S Sader, Mr I Baatjes, EZ Hina, R Govender, TC Ngubane and I siab have been granted permission to conduct research with the following terms and conditions:

- That as researchers, he/she must present a copy of the written permission from the Department to the Head of the Institution concerned before any research may be undertaken at a departmental institution.
- Attached is the list of schools she/he has been granted permission to conduct research in, however, it must be noted that the schools are not obligated to participate in the research if it is not a KZNDoe project.
- Dr WJ Green, Ms S Sader, Mr I Baatjes, EZ Hina, R Govender, TC Ngubane and I siab have been granted special permission to conduct his/her research during official contact times, as it is believed that their presence would not interrupt education programmes. Should education programmes be interrupted, he/she must, therefore, conduct his/her research during nonofficial contact times.
- No school is expected to participate in the research during the fourth school term, as this is the critical period for schools to focus on their exams.


for SUPERINTENDENT GENERAL
KwaZulu Natal Department of Education

APPENDIX C

Request For Access To Selected Educators To Conduct Research



UNIVERSITY OF
KWAZULU-NATAL
PIETERMARITZBURG CAMPUS

School of Education and Development
Faculty of Education

Date: 5/09/07

Dear Principal,

Request for access to selected educators to conduct research

I am an M.Ed student in the Faculty of Education at the University of KwaZulu-Natal, and have been granted permission by the KZN provincial Department of Education to conduct research in seven secondary schools, using educators in middle management (Mathematics and Science HOD's) as participants in the study. The title of my research is **an investigation of the impact of educational reform of educators in middle management positions in secondary schools in KZN**

I have selected your school as one of the sites for my study, pending your approval. My visits to the school will be at your convenience and will not disrupt the work of the participants.

Participants will be required to participate in an individual interview and then a focus group discussion with other educators where general ideas about the impact of educational reform on educators in middle management will be discussed.

My project is being supervised by:
Dr WJ Green
Lecturer
School of Education and Development
Faculty of Education
University of KwaZulu-Natal
Tel: 033-2605912

He can be contacted if you have any questions regarding the project.

Attached please find a copy of a letter from the Director of Research, Dept of Education, KZN, granting permission for this project.

Thank you for your co-operation in this regard.

Yours faithfully,

E.H.Z. Hina
M.Ed Student
Cell: 0721015354

APPENDIX D

Participation Agreement

I, _____ agree to participate in this research project on 'the impact of education reform and globalisation on the work of educators in middle management' that is being conducted by Mrs. E.H.Z. Hina from UKZN – educational and development.

I understand that the purpose of this study is to hold a group interview to find out about the impact of education reform and globalisation on the work of educators in middle management; we will discuss our general ideas about the impact of education reform in your work as an HOD.

I understand that the study involves a focus group interview that lasts two hours or less, which will be audiotaped.

I understand that my participation in this study is entirely voluntary, and that if I wish to withdraw from the study or to leave, I may do so at any time, and that I do not need to give any reasons or explanations for doing so. If I do withdraw from the study, I understand that this will have no effect on my relationship with you or any other organisation or agency.

I understand because of this study, there could be violations of my privacy. To prevent violations of my own or others' privacy, I have been asked not to talk about any of my own or others' private experiences that I would consider too personal or revealing.

I also understand that I have an obligation to respect the privacy of the other members of the group by not disclosing any personal information that they share during our discussion.

I also understand that all the information I give will be kept confidential to the extent permitted by law, and that the names of all the people in the study will be kept confidential.

I understand that I may not receive any direct benefit from participating in this study, but that my participation may help others in the future.

The members of the research team have offered to answer any questions I may have about the study and what I am expected to do.

I have read and understood this information and I agree to take part in this study.

signature

Date

For more information feel free to contact Mrs. E.H.Z. Hina- (033) 3221664 (h)
(033)3981958 (w) 0721015354.

APPENDIX E

Questionnaire

SECTION A: personal profile

1. Gender
2. population group (required for purposes of representation)
3. How many years have you been working as an HOD?
4. For what subjects are you responsible?

SECTION B: Job description (duties and roles)

5. Do you have an official job description as Head of Department?
6. What is your official job description, and what duties does it require you to perform?
7. Does your work involve the following:
Providing support to educators. In what ways?
Monitoring of Examinations (matric and other grades). What does this involve?
Participating in department programmes like, IQMS etc. How do you participate?
Involvement in school management issues. Give examples.
8. How do you feel about HODs conducting activities like, IQMS, supervision of teachers etc?
9. Is the work that you are doing matching what is exposed in term of your job description?
10. Are there any tensions between what you understand your work to be, and the actual things you are required to do?
11. Do you experience any challenges /difficulties in your role? What are these?
12. Please describe the nature of your relationship with teachers you support?

SECTION C: Education Reform

13. Has your work as HOD changed in any ways over the last 10-15 years?
14. From your perspective, what has caused these changes?
15. How do you feel about the changes?

16. How have these reforms generally affected your professional roles and work?

SECTION D: Science and Maths

17. Do you think Science and/or Maths is treated differently or has greater status than other subjects in the curriculum? What are the reasons for this?

18. If you were to be involved in policy making, what would be the key roles and responsibilities of Head of Departments?

APPENDIX F

Focus Group Interview Schedule

Focus group interview schedule

Work experience (current and past)

You have been an educator in [institution] for[x] years. I am interested in your experience as an educator and would like to know how your practice has changed over the last 10 years.

1. What are the most significant changes (changes not problems) in teaching and learning in the last 10 years?
2. What do you regard as the reasons for these changes?
3. How did you (do you) respond to these changes?
4. How do you feel about these changes?

Policy

Since 1996 there have been a number of policy developments in education

1. What policies have affected your practice?
2. How have they affected your teaching practice (school, etc.)?
3. What is your understanding of the need for these policy changes?
4. How do you feel about these changes (participation and influence in the development and implementation of policy)

Democracy and citizenship (and Human rights)

Some key words that are constantly being used in education are democracy and citizenship

How are these expressed in your school? How do you feel about it?

International developments

Are you aware of international developments that might affect South African education?

Thank you