UNIVERSITY OF KWAZULU-NATAL

INYUVESI YAKWAZULU-NATALI

THE ROLE OF SUBJECT ADVISORS IN SUPPORTING INSTRUCTIONAL LEADERSHIP PRACTICES IN SCHOOLS: THE CASE OF ONE EDUCATION DISTRICT IN KWAZULU-NATAL

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BY

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DECLARATION OF ORIGINALITY

I, Jeffrey Shozi, declare that this research project, "**The role of subject advisors in supporting instructional leadership practices in schools: the case of one education district in KwaZulu-Natal**" abides by the following guidelines:

 (i)   The research presented in this dissertation is my original work and reference to the work of others has been duly acknowledged.

(ii)   This dissertation has not been submitted for any degree or examination at any other university.

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SUPERVISOR'S STATEMENT

This dissertation was submitted with/without my approval

_____

Mr Simphiwe Eric Mthiyane

2014

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DEDICATION

I dedicate this work to:

My wife **Bacebile** for her love, encouragement, understanding and support throughout this academic journey and to my son **Sinenhloso** for inspiring me to soldier on.

My parents, who both passed on during my studies. How I wished they lived longer to see the fruits of their parenthood. May their souls rest in peace.

ABSTRACT

This research project explored the role of subject advisors in supporting instructional leadership practices in schools. It was conducted as a case study in one education district in KwaZulu-Natal and involved four subject advisors. One supervised the Junior Phase, the other the Senior Phase and the last two the Further Education and Training Phase. The study investigated what subject advisors do to enact their roles of supporting instructional leadership practices in schools, what are their overall experiences and how they interact with those experiences.

This qualitative study was located within an interpretive research paradigm. Instructional leadership and transformational leadership theories were adopted for the study. International, continental and national scholastic literature was interrogated to seek more insight into the research topic. In-depth semi-structured interviews and documents reviews constituted data generation instruments. Data generated was analysed employing thematic analyses that identified codes, categories and themes.

The findings informed a general conclusion that subject advisors experience circumstances that impinge on their responsibilities of supporting teaching and learning practices in schools. These impingements render subject advisors less effective as instructional leaders and that has a negative bearing on the academic performance of some of the schools under their supervision. It was also concluded that the Department of Basic Education (DoBE) was not doing enough to support subject advisors in their endeavours. These conclusions and others informed recommendations that aimed at translating the status quo, within the subject advisors' practice, into being more effective and efficient.

LIST OF ACRONYMS

C2005	**:**	Curriculum 2005
DoBE	**:**	Department of Basic Education
DoE	**:**	Department of Education
ED	**:**	Education District
HoD	**:**	Head of Department
ICT	**:**	Information and Communications Technology
NCS	**:**	National Curriculum Statement
NED	**:**	National Education Department
NSC	**:**	National Senior Certificate
OBE	**:**	Outcomes-Based Education
PED	**:**	Provincial Education Department
RNCS	**:**	Revised National Curriculum Statement
SMT	**:**	School Management Team
USA	**:**	United Sates of America
CAPS	**:**	Curriculum and Assessment Policy Statements

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CHAPTER ONE
INTRODUCTION TO THE STUDY

1. 1   Introduction

The Department of Basic Education (2013) acknowledges that one of the reasons for poor service delivery in education in South Africa, is the incapacity of some of the education district offices in providing quality services to schools. Some education district offices understand their roles well and perform them to a high level of efficiency but the majority of them do not (DoBE, 2013). Education districts have a responsibility of ensuring that effective teaching and learning take place in schools. The subject advisors' role, as the education district personnel, is to " facilitate curriculum implementation and improve the environment and process of learning and teaching by visiting schools, consulting with and advising school principals and teachers on curriculum matters" (DoBE, 2013, p.11). This research investigated the role of these district officials, in providing quality instructional leadership in schools.

1. 2   Purpose and rationale

Having been in the teaching profession for twenty one years, first as a post level one teacher and later as the Head of Department (HoD), the researcher's interaction with the subject advisors has been mostly confined to workshops either at a district or regional level. These workshops dealt either with common administrative issues or curriculum matters. Administrative matters would be, for instance, ensuring that teachers keep records of their work and are also up to date with their tasks as specified in their work programmes. Curriculum matters would include introduction of new subject policies or a change in the curriculum content.

The researcher's concern was that the workshops referred to above would address schools as if they were similar, disregarding their unique nature and as a result would not assist teachers in dealing with the unique curriculum challenges in their particular schools. This gap, the researcher argues, should be filled in by the subject advisors visiting schools and addressing their unique situations. Unfortunately, these departmental officials seldom visit schools as required (DoBE, 2013).

The researcher also noted with concern that teachers who produced good records of their work were always in good terms with their subject advisors. The question of whether those records were an authentic reflection of what was going on in the classroom was another matter. The researcher, in his career as a teacher barely witnessed subject advisors observing a lesson in the classroom as one of the requirements of their roles of supporting schools (DoBE, 2013). That is why, the researcher argues, some schools perform badly because there is less close monitoring and support by the subject advisors during the course of the year. Even some schools that perform better do not improve on quality because, according to the researcher's point of view, of the failure of the subject advisors to assist them with improvement strategies.

The researcher further argues that the education district offices are more administrative than addressing teaching and learning matters at schools. He believes that more attention is given to administrative matters at the expense of quality teaching and learning. The main focus is on how schools are managed and less on what learners achieve. This assertion is confirmed by the Department of Basic Education (2013) when admitting to the fact that the Provincial Education Departments (DEPs) have given increased priority to district administrative and professional responsibilities at the expense of what education district offices should be or do. The researcher has also noted other colleagues, as critical friends, raising concerns about subject advisors coming to schools late in the year and expecting good and orderly kept teachers' records of work without, however, having supported them from the beginning of the academic year.

In South Africa, the new democratic dispensation has seen the introduction of several curriculum related reforms. One of those was the Outcomes-Based Education (OBE) system that was introduced with no adequate training provided towards implementation (Hoadley, Christie & Ward, 2009). Subject advisors, as instructional leaders, have a significant responsibility of providing quality support and instruction to schools (Pansiri, 2008). Scholars generally concur that change is a complex and complicated process (Harris, James, Gunraj, Clarke & Harris, 2006; Hargreaves & Fink, 2006; Hatch, 2009) so subject advisors should be well capacitated in assisting schools with policy implementation that will positively influence instructional improvement.

Furthermore, inequalities still exist throughout the South African education system with former white schools still performing better than former African schools (Christie, Butler & Potterton, 2007). The researcher argues that subject advisors have the responsibility of addressing this discrepancy if the inequalities of the past are to be adequately addressed in the South African education system.

The literature reviewed on this topic does not specifically point out what subject advisors do towards instructional improvement, but the emphasis is on what is supposed to be done (Sykes, Schneider, Plank & Ford, 2009; DoBE, 2013). The DoBE (2013) also acknowledges that many, if not most, education district offices are incapable of providing the quantity and quality of support that schools require. Unfortunately, very little has been researched in South Africa in the area of education district offices and their responsibilities. This study attempts to fill that gap by exploring the role of subject advisors in leading, managing and supporting instructional leadership practices in schools. It is hoped that the findings thereof will assist the subject advisors and the senior education district officials to refocus on the core responsibilities of these important instructional leaders. It is also hoped that it will emphasise on the need for the empowerment of subject advisors and a close monitoring of what they do towards improving instruction in their schools.

1. 3   Research aims and critical questions

The aims of this study are:
- To explore the role the subject advisors play in leading, managing and supporting instructional leadership practices in schools.
- To explore subject advisors' experiences as they support instructional leadership practices in schools.
- To investigate how subject advisors interact with their experiences as they support instructional leadership practices in schools.

This research sought to answer the following questions:
- What do subject advisors do to enact their roles of supporting instructional leadership practices in schools?
- What are the subject advisors' experiences as they lead, manage, and support instructional leadership practices in schools?

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▪ How do subject advisors interact with their experiences as they support instructional leadership practices in schools?

1. 4   Clarification of key concepts

1.4.1   Instructional leadership

Two key words are involved in this concept. *Leadership*, on one hand, involves interaction between a leader and the followers (Pansiri, 2008). The leader, Pansiri (2008) argues, applies motivational strategies to get the interest and the support of the followers towards the attainment of the organisational goals. Concurring with this argument is Bush (2004) who views leadership as the process of influencing the activities of an organised group towards goal setting and goal achievement. *Instruction*, on the other hand, means the interaction between teachers and the curriculum towards developing a quality learner (Pansiri, 2008). *Instructional leadership* therefore is the effective professional intervention in the teaching and learning processes with the purpose of improving learners' learning (Pansiri, 2008).

1.4.2   Transformational leadership

Transformational leadership is about organisational change and the leadership role in developing shared understanding about the organisation, its effectiveness as well as its purpose and vision. Davies (2005) posits that the role of a transformational leader, in a school,   is to help the staff to develop a shared understanding about the school, its activities as well as its purpose and vision.

1.4.3   Management

Christie (2010) defines management as relating to structures and processes by which organisations meet their goals and central purposes. She further argues that management is more likely to be tied to formal positions than to persons. This means, to the researcher, that management is about controlling resources, both human and material, in order to achieve organisational goals.

1. 5   Literature review and theoretical frameworks

1.5.1   Review of literature

Education is a prerequisite for a full and meaningful citizenship and a better life for all (DoBE, 2013). This can be achieved through effective instructional improvement but some education districts are incapable of stimulating and sustaining this responsibility (Corcoran, Fuhrman & Belcher, 2001). Concurring with this assertion are Honing, Copland, Rainey, Lorton and Newton (2010) who contend that transformation of the education district offices is essential if they are to play a powerful and meaningful role in supporting effective teaching and learning in schools.

In supporting the above assertion, the researcher argues that the global educational demands, such as the promotion of good health, sustainable development and environmental protection (UNESCO, 1990), with which the education district offices have to contend, are ever-changing and challenging. The implication thereof is that the subject advisors who deal directly with the schools, on instructional matters, must always be equal to the task. Some researchers (Elmore & Burney, 1997) argue for the bypassing of the district offices because, they contend, of their incapacity to create and sustain instructional improvements. They argue for a direct link between the central government and the schools. The researcher argues that this assertion, however, does not address its feasibility, given the vast number of schools that will have to deal directly with the central government. It also does not address how the central government can accommodate the uniqueness of each school. The researcher is of the view that subject advisors are the key to instructional improvement but these essential leaders need to be capacitated and supported. Childress, Elmore, Grossman and Johnson (2007) assert that in the past, education leaders were glorified for being visible and active but the new public expectations require them to be responsible for the results rather than appearances or best efforts. They further argue that for the educational reforms to be effective, they must be carefully adapted to each community, school and classroom. This implies that subject advisors must be able to plan across any differences in order to achieve excellent results for each and every learner (Childress, *et. al.*, 2007).

Hoadley, *et. al.* (2009) argue that the demand for external accountability has necessitated dramatic and rapid changes in the South African education system. Further, Hoadley and Ward (2009) contend that school management in South Africa, has experienced drastic

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changes in the post-apartheid period. Power and control, they argue, have been decentralised from the central government down to the district and the school levels. This, the researcher asserts, implies that education districts have to plan and implement programmes that will effectively guide and support schools within their jurisdiction. The question is that, are the education district officials, particularly subject advisors, well equipped to navigate this mammoth task?

The disconcerting factor about the South African education is that the present educational research (Hoadley & Ward, 2009; Christie, 2010) is irrelevant to the South African context and does not empower South African school managers on instructional leadership. These school managers, the researcher argues, are dependent on the education district personnel for guidance and support. It is therefore a worrying factor if some of the education districts officials are also not adequately equipped for this challenge.

1.5.2 Theoretical frameworks

This study was informed by two theories: the instructional leadership theory and the transformational leadership theory. Instructional leadership theory views an instructional leader, according to Hallinger (2005), as a person who is goal-oriented, able to define a clear direction for the school and is also able to motivate others to join in its achievements. Hallinger (2005) further argues that an instructional leader not only focuses on leading but also on managing which includes co-ordinating, controlling, supervising and developing curriculum and instruction.

Transformational leadership theory's main concept is change and the leadership role in envisioning and implementing the transformation of organisational performance. All transformational approaches to leadership emphasise emotions and values and share in common the fundamental aim of fostering capacity development and higher levels of personal commitment to organisational goals on the part of the leader's colleagues (Davies, 2005).

1. 6 Research design and methodology

A research design, according to Johnson and Christensen (2012) is an outline, plan or strategy one uses to seek answers to one's research questions. Lankshear and Knobel (2010) argue that the data generated and its analysis should be appropriate to the problem involved and the

questions asked. This is achieved, they further argue, by approaching a research using an orderly, systematic and reasonable design.

According to Creswell (2012) there are eight different types of research designs namely; experimental, correlational, survey, grounded theory, ethnographic, narrative research, mixed methods and action research designs. This study followed a narrative research design because it focused on the experiences of individuals and how these individuals interacted with others (Creswell, 2012). This study investigated the experiences of subject advisors and their interaction with other stakeholders interested in education.

In addition, methodology refers to a theory of generating knowledge through research as well as providing reasons for using particular techniques (Gough, 2000). According to Lankshear and Knobel (2010) there are two types of approaches to a research. These are the quantitative and the qualitative approaches. This study adopted a qualitative approach because it tried to understand the participants in a particular context and also to understand their relationship with other events (Lankshear & Knobel, 2010). This study investigated the subject advisors executing their duties of instructional leadership and tried to understand how their roles, as instructional leaders, were influenced by the school society and the global expectations. As a qualitative study, the role of the subject advisors, in instructional leadership, was analysed with the aim of exploring their effectiveness (Dane, 2011).

1.6.1   Research paradigm

A research is also influenced by a particular paradigm which is a belief about and the nature of knowledge (Mackenzie & Knipe, 2006). Cohen, Manion and Morrison (2007) distinguish between four different types of paradigms namely; positivism, interpretivism, feminism and critical paradigms. All these paradigms have their own ontology, epistemology and methodology. This study adopted interpretivism as a research paradigm as defined by Cohen, *et. al.* (2007) who argue that an interpretivist tries to understand the participants' perceptions and beliefs by engaging the situation from their point of view. In this study, the researcher had a deeper understanding (Leedy & Ormrod, 2010) of the subject advisors' experiences through interviewing them and reviewing their documents.

1.6.2   Study approach

Johnson and Christensen (2012) argue that there are four approaches to a qualitative study. These are phenomenology, ethnography, case study and grounded theory. The researcher approached this research as a case study.

1.6.3   Methods of data generation and analysis

Data was generated through in-depth interviews with the subject advisors. These interviews were recorded and transcribed. To ensure reliability of data generated, triangulation was employed by reviewing administrative documents in support of verbal data. Arrangements were made with the participants to allow interviews in their offices after hours. The researcher served as the primary data generation instrument by personally interviewing the participants and recording their responses (Johnson & Christensen, 2008). Data was categorised into themes. These themes were checked against the transcripts to ensure authenticity of the findings.

1.6.4   Sampling

Four subject advisors from one education district office in KwaZulu-Natal were interviewed. This was purposive sampling because the researcher wanted to specify the findings to a particular group, that is, the subject advisors (Creswell, 2012). Purposive sampling is an example of non-probability sampling which is in line with interpretivism on which this study is based (Gough, 2000).

1.6.5   Issues of trustworthiness

To ensure consistency, all four participants were asked the same questions during interviews. Semi-structured interviews were used to allow for the follow-up on the participants' responses (Creswell, 2012). To ensure trustworthiness, copies of the transcripts were shown to the participants to confirm their contents. Data was categorised into themes. These themes were checked against the transcripts to ensure authenticity of the findings. Participant feedback (Johnson & Christensen, 2012) was implemented to validate the accuracy of the findings.

1.6.6   Ethical issues

This was the staff project within the School of Education of the University of KwaZulu Natal and ethical clearance was sought by the project co-ordinator, Mr S.E. Mthiyane. As a field

worker, the researcher wrote a letter to the Department of Basic Education requesting permission to conduct research in their district involving their employees. The second letter was written to the District Director informing her of the proposed study. Other letters were written to the four subject advisors, in the targeted district, seeking their permission to participate in the project and also explaining what the whole project entailed.

1. 7   Limitations to the study

The findings of this study were based on self-reported data and the participants' responses could be biased or be socially acceptable rather than the actual truth. To mitigate this limitation, the researcher reviewed administrative documents in support of verbal data as a form of triangulation. Another limitation could be that data was generated from four subject advisors from only one district in KwaZulu-Natal but data analyses was influenced by other empirical findings on the same or similar titles, therefore this study's opinions cannot only be confined to its research site.

1. 8   Delineation of the study

The study was confined to one district and four subject advisors in the province of KwaZulu-Natal.

1. 9   Organisation of the study

Five chapters comprise this study and each looks at different aspects of the research process.

Chapter One introduces the problem of the study, the critical questions, literature review, theoretical frameworks and its setting.

Chapter Two reviews literature and the theoretical frameworks relevant to the problem introduced.

Chapter Three pronounces on the research methodology and theoretical frameworks.

Chapter Four presents and discusses generated data.

Chapter Five presents the summary, the conclusions and the recommendations of the study.

1. 10   Chapter summary

This chapter presented the problem and its background. Critical questions were raised followed by a brief review of literature and the theoretical frameworks adopted for the study. Research design and methodology were explained and relevant concepts also clarified. The outline of the following chapters of this study was also provided. The next chapter will review literature and discuss the theoretical frameworks that underpin this study.

CHAPTER TWO
LITERATURE REVIEW AND THEORETICAL FRAMEWORKS

2.1 Introduction

The previous chapter presented the problem and its background. The research design and methodology were briefly explained and relevant concepts were also clarified. This chapter then reviews what different scholars pronounce on the education districts' role on instructional leadership practices. The researcher starts by reviewing what the international scholars argue about this topic. Thereafter, the continental literature is analysed. This is followed by a review of the national literature starting with the brief history of education in South Africa, post 1994, precisely because this study specifically interrogates the role played by the education district officials in South African schools. The next section is about the theoretical frameworks underpinning this study and this will be followed by the chapter summary. For the benefit of this study, the terms instructional leaders and subject advisors are used interchangeably as subject advisors are instructional leaders in their subjects.

2.2 Literature review on instructional leadership

For the past two decades, some researchers have downplayed the importance of education districts in instructional improvement (Rorrer, Skrla & Scheurich, 2008). Researchers such as Smith and O'Day (1991) as well as Finn (1991) have argued against the positive influence education districts have on school reforms. Smith and O'Day (1991) view schools as the core in the change process. They regard school principals and teachers as "initiators, designers, and directors of change efforts" (p. 235). Finn (1991) also views education districts as insignificant but schools as being in the centre of the reforms. Although this conception has gained acceptance in some research circles, other scholars (Childress, Elmore, Grossman & Johnson, 2007; Rorrer, Skrla & Scheurich, 2008; Bantwini & Diko, 2011) hold a different view. They argue that education districts are vital institutional actors in educational reforms.

2.2.1 International literature

Rorrer, *et. al*. (2008) argue that studies focusing on education districts, over the past twenty years have been limited given that many scholars viewed schools as core in instructional delivery and improvement. They further argue that some studies have now recognised the potential of education districts in enhancing the reform efforts in schools and have since

shifted their focus to these local administrative offices. Anderson (2003) argues that these administrative offices vary in their approaches in supporting instructional improvement in schools due to the different conceptions their personnel have about their responsibilities.

Robinson (2010) argues that the link between instructional leadership and learner outcomes has influenced educational policies in USA, England and New Zealand. Drysdale and Gurr (2011) assert that Australia has also been affected by this attention on school leadership and its impact on learner performance. Robinson (2010) argues that some studies on school leadership, in the last decade, have focused on its impact on instructional improvement. She further differentiates between known effective leadership practices and the capabilities of the leaders in engaging in those practices. She contends that the study around effective leadership practices in schools has grown tremendously, but the implementation skills are still less developed. Spillane and Loius (2002) argue that without an understanding of the knowledge necessary for teachers to teach well, the content to be taught and specific pedagogical knowledge of learners, school leaders will be unable to support instructional improvement and teacher activities.

Tan (2012) states that instructional leadership alone cannot yield positive outcomes if learners, as stakeholders, are not equipped with specific skills that are particularly relevant for the global economy. This, Tan (2002) further argues, challenges instructional leaders to be ingenious in equipping teachers with the capability of facilitating the acquisition of these skills in learners. He further suggests that instructional improvement in schools is hindered by passive knowledge application and management that do not take the contextual factors into cognisance. He contends that instructional leaders must first conduct action research that will investigate and identify problem areas so as to make evidence-based decisions about teaching and learning. "They must then determine the context that the school is operating in before they can hope to address issues pertaining to staff competence levels and learning needs, as well as student home background and learning profile" (Tan, 2012, p.186). In concurring with Tan, Coburn and Talbert (2006) suggest that instructional leadership should emphasise on action research that will create contextualised knowledge that will serve the unique nature of each particular school.

Tan's (2012) suggestion, the researcher argues, can be a mammoth task for subject advisors given that one subject advisor is responsible for quite a number of schools, but if they can

equip teachers, under their leadership, with skills to conduct this research at the school level, most problems hindering instructional improvement can be identified and possibly addressed. The researcher further asserts that subject advisors, as instructional leaders at the education district level, must also encourage teachers to develop themselves professionally in order to be able to develop and utilise research skills.

Coburn and Talbert (2006) are consistent with Tan's (2012) argument about evidence based teaching. They contend that the current policies demand schools to use evidence to guide their educational improvement efforts but they caution that the implementation of evidence-based practice will differ depending on individual teacher's conceptions of "valid evidence, evidence use and high-quality research" (Coburn & Talbert, 2006, p.471). They further assert that because of their different roles and responsibilities, school administrators' and teachers' experiences are different and are thus likely to differ in their views of the implementation of evidence-based teaching and learning approach. This is precisely because "individuals with different work roles have substantively different data needs" (Coburn & Talbert, 2006, p.491). To overcome these challenges, Coburn and Talbert (2006) suggest three possible solutions. First, evidence-based practice must allow for and support access to different kinds of evidence for different purposes at different levels of the system. Second, education district administrators must mediate diverse conceptions of evidence and research in order to develop coherent and complementary evidence-based practice within education districts. Third, there must be mechanisms of communicating across different school cultures in order to avoid evidence-based practices that have competing ideologies based on different cultural influences.

Childress, *et. al.* (2007) identify five managerial challenges that education district offices face as they implement strategies towards improving instruction in schools. These challenges, they argue, are first, implementing improvement strategy effectively across schools with different characteristics; second, redesigning the schools so that they support the strategy; third, developing and managing human capital to carry out the strategy; fourth, allocating the resources in alignment with the strategy and last, using performance data for decision making, organisational learning and accountability. Following is an in-depth discussion of these managerial challenges as argued by Childress, *et. al.* (2007).

Childress, *et. al.* (2007) argue that the important factor in schools is instructional core which represents what goes on in class. This core, they further contend, includes three interdependent components which are the learner, the teacher and the content. This core is driven by the actions the education district office undertakes to ensure effective learning and good learner performance. In order to ensure instructional improvement, the education district must articulate a strategy of "how it will strengthen and support the instructional core through intergraded activities that increase teachers knowledge and skills, change the students' role in teaching and learning processes and ensure that the curriculum is aligned with the benchmarks for performance"(Childress, *et. al.*, 2007, p.3). These scholars are aware that schools are unique in their character but argue that districts can design different strategies aimed at a particular unique school situation. These scholars however, the researcher argues, overlooked the role to be played by each school community in designing its unique improvement strategies. The researcher strongly believes that given the uniqueness of each school, as articulated above, education district offices need to work collaboratively with schools in identifying their own unique problems.

The public education sector has long had a culture that valued efforts rather than the results. By this Childress *et. al.* (2007) mean that as long as people appear to be working hard, they could go on without accounting for the learners' performance and that could lead, they further argue, to defeatism amongst teachers. They contend that in today's environment, where accountability is the order of the day, education districts must develop a culture of collaboration, high expectations and accountability. They assert that education districts must be structured in such a way that their responsibilities are clear in terms of who is responsible for what, who is accountable and who makes decisions. They further assert that the culture of the organisation is also crucial and is shaped over time by individual practices and beliefs. They argue that education district leaders must behave in a particular manner that will send precise signals about which behaviours are valued and desired in schools.

Childress *et. al.* (2007) further argue that district leaders must allocate resources in a way that is coherent with the education district strategy. They posit that money is essential when it comes to resources but organisational resources are equally important. By organisational resources they mean people, time and other assets like technology and data. They contend that education district leaders must prioritise the activities that need resources more than others, activities that are crucial and coherent to the education district strategy. They further

assert that resources must be directed to the district strategy to make the instructional core more powerful and effective. The researcher concurs with the above assertions but is also of the view that the district strategy should be informed by the schools' improvement strategies. The schools should be involved in identifying the resources they need to support their teaching and learning practices. Care must be taken not to distribute resources that are redundant or irrelevant to certain schools. The researcher, as a seasoned teacher and a manager, has had such experiences where resources are brought to school without ascertaining whether they are needed or not. Some of these resources end up lying somewhere unused when there are unavailable resources that could have positively influenced instructional improvement practices. In order to further strengthen the district strategy, Childress *et. al.* (2007) posit that the stakeholders, that are outside education, but who have legitimate interest in the schools, must be involved in instructional matters as they can influence the district strategy. Parents, NGOs, local politicians, *etcetera,* must be invited for their wisdom and that can also prevent a disruptive force from them if left outside.

Allocating resources to schools and the effective teacher development strategies are informed by detailed learner performance data that will pinpoint areas where the instructional process needs to change or improve (Childress, *et. al.*, 2007). They argue that education district leaders must devise effective assessment tools that will give accurate data in terms of the learner performance which will in turn inform remedial and improvement strategies. Hallinger (2009) like Childress, *et. al.* (2007), cautions against a "one size fits all" approach to leadership. He argues that schools differ widely in terms of their needs and resources and that determines the type of leadership needed to take a particular school forward. He therefore advises instructional leaders to take into cognisance the uniqueness of a particular context when executing their responsibilities.

2.2.2 Continental literature

Africa has also been affected by the global reforms in the education sector. African states, like their global counterparts, changed their approach from centralised control and gave regional or district offices more responsibility with the aim of improving instructional leadership in their schools. De Grauwe, Baldé, Diakhaté, Moustapha and Odushina (2005) argue that this was in response to the pressures from the global community, as well as the demand for expediency in service delivery.

Furthermore, De Grauwe, *et. al*. (2005) assert that this paradigm shift led to concerns about its effectiveness. First, they argue that this decentralisation process did not take into account the specific context of the countries where it was going to be implemented. Second, they contend that several countries adopted this policy without paying much attention to the implementation processes and that resulted in different practices by the districts of the same government.

The study conducted by De Grauwe, *et. al*. (2005) in Benin, Guinea, Mali and Senegal reveals similar trends like those in South Africa (Christie, 2006; Hoadly & Ward, 2009). First, some education districts do not have the capacity to carry out their roles effectively. Second, the education districts and schools within their jurisdiction have a problem of the scarcity of the resources. Third, the principals or head teachers together with their teachers are poorly prepared for their responsibilities. This last finding is also consistent with Pansiri's (2008) finding in Botswana about teachers' inadequate training and their inability to provide effective instructional leadership.

In a scenario painted above, the researcher argues, the roles of subject advisors are indispensible. Their core mission is to monitor and support the quality of teaching and learning in their schools. Effective instructional leadership entails proper curriculum management and Pansiri (2008) concurs with De Grauwe, *et. al.* (2005) when articulating that curriculum management should involve instructional supervision, classroom visits as well as professional development, but the study referred to above (Pansiri, 2008) reveals something to the contrary. Very few school and class visits are conducted by the subject advisors and these instructional leaders are also not able to provide adequate resources to support effective instructional improvement. Another finding is that they seldom engage in strategic planning but react to situations (De Grauwe, *et. al*., 2005).

Most literature on effective instructional leadership in schools is on the developed and industrialised countries whose contexts are completely different from the African context (Otunga, Serem & Kindiki, 2008). These scholars argue that it would be inaccurate to assume that conditions in African schools are similar to those in the schools in the developed countries. These researchers caution against generalising about effective instructional leadership practices in schools as this might paint a very negative picture about African schools. They further posit that considerable progress has been achieved in African schools

over the past two or three decades. However, they concur with other studies (Niane, 2003; De Grauwe, *et. al*., 2005; Pansiri, 2008) in that, generally, African schools do not get the necessary instructional support and supervision from the education district personnel.

Wanzare (2012) defines instructional supervision as all the activities that are directed specifically towards the establishment, maintenance and improvement of the teaching and learning processes in schools. He asserts that this process of instructional improvement often occurs in a formal context of supportive teacher–supervisor interactions. Beach and Reinhartz (2000) view instructional supervision as core in instructional improvement as it provides teachers with feedback that would enable them to improve on their practises. Concurring with this contention is Sergiovanni (2001) who asserts that instructional supervision and assessment assist teachers improve their skills and knowledge in their field and this in turn improves learners' academic achievement (Wanzare & da Costa, 2000).

Sergiovanni (2001) asserts that teacher supervision and evaluation should help teachers grow, improve teaching skills, and expand knowledge and use of teaching repertoires. Beach and Reinhartz (2000) view instructional supervision as a process that caters for instructional improvement and provides teachers with feedback on their teaching so as to strengthen instructional skills to improve performance. According to Wanzare and da Costa (2000), the purpose of instructional supervision is to focus on teachers' instructional improvement which, in turn, improves student academic achievement as well as their attitude and behaviour towards their school work and their personal life (Pansiri, 2008).

Wanzare (2012) also asserts that instructional supervisors should endeavour to work collaboratively with teachers in establishing supervisory support that can provide confidence and reduce anxiety often experienced by teachers in response to supervision. This, he further argues, can be achieved by open and honest interaction that will lead to mutual understanding of how the process will unfold. The lack of trust and collaboration between instructional supervisors and teachers can be a direct result of communication breakdown between the two parties and this can result in instructional supervision viewed as a witch-hunting exercise (Moswela, 2010; Wanzare, 2012).

Niane (2003) takes us to another level by arguing that changes in education governance and management style alone cannot guarantee improvement in instructional leadership.

Overcrowded schools, demotivated teachers, and societal problems like poverty, violence and HIV & AIDS (Otunga, *et. al.,* 2008) are some of the challenges that subject advisors as instructional leaders have to contend with. Otunga, *et. al*. (2008) further argue that innovative instructional leaders have to work in collaboration with all the stakeholders including structures outside the education sector to overcome these barriers.

Studies about the effectiveness of education and instructional leadership in Africa come to similar findings and conclusions. In countries like Botswana (Pansiri, 2008 & Moswela, 2010); Kenya (Sitati, Ngaira, Mwita, Amol, Akal & Ngaira, 2012; Wanzare, 2012); Nigeria, Senegal, DRC and Rwanda (Otunga, *et. al*., 2008); Benin, Guinea, Mali and Senegal (De Grauwe, *et. al*., 2005) the researcher identifies the following general similarities: under-qualified and under-developed teachers; demotivated teachers with low morale; lack of trust and collaboration between instructional supervisors and teachers; under-resourced education districts and schools; lack of parental or community involvement in the affairs of the schools; hostile and intimidating school environments that are not conducive to proper instructional leadership; lack of feedback from the instructional supervisors and the lack of proper implementation of policies.

2.2.3 National literature
2.2.3.1 Brief history of the education in South Africa post 1994

The South African political reforms, post the democratic elections in 1994, brought with it policies that tried to dismantle apartheid practices in education and introduced the new education system that would ensure high quality education for all. Several curriculum transformations were effected to respond to the call by the Constitution of the Republic of South Africa (1996) and the South African Schools Act (1996) that required education to be transformed and democratised in accordance with values of human dignity, equality, human rights and freedom for all. The researcher, however, argues that the main focus here was transforming and democratising the education system neglecting the quality and the practicality, in terms of implementation, that was supposed to come with it. Following below are the reasons why the researcher argues in this manner:

A shift in emphasis from rote learning and content saw the introduction of Curriculum 2005 (C2005) in 1997 (DoE, 2000) that had an outcomes based philosophy that envisaged the kind of citizen the education system should produce. The implementation of C2005 was

problematic and the problems noted in the *Report of the Review Committee on C2005* (DoE, 2000) included a skewed curriculum structure and design, lack of alignment between curriculum and assessment policy, inadequate orientation, training and development of teachers, learning support materials that were variable in quality, often unavailable, and not sufficiently used in classrooms, policy overload and limited transfer of learning into classrooms, shortages of personnel and resources to implement and support C2005, inadequate recognition of the curriculum as the core business of education departments (DoE, 2000).

To address the above challenges, the Revised National Curriculum Statement (RNCS) and the National Curriculum Statement (NCS) were implemented in 2004 for GET and 2006 for FET bands respectively (DoBE, 2009). These efforts, however failed to close the gaps identified in C2005 and did not achieve the intended results (Mafora & Phorabotha, 2013). According to the DoBE (2009), the following areas were identified, amongst others, as being problematic. First, there was no clear plan for implementation and support which led to the confusion amongst teachers. Second, teachers were overloaded with administrative work and less time was devoted to teaching. Third, the assessment criteria were confusing and that resulted in learner overall underperformance. Another point worth mentioning is that the success of the new curriculum was dependent on subject advisors who were supposed to act as intermediaries (Bantwini & Diko, 2011) between the new curriculum policy and the classroom implementation. Unfortunately, many did not have sufficient knowledge and skills to offer teachers the support they required to improve the learner performance (DoBE, 2009).

The final report of the *Task Team for the Review of the Implementation of the National Curriculum Statement* (DoBE, 2009) saw the combination of RNCS and NCS into one National Curriculum Statement Grades R-12. This new curriculum builds on the previous curricula but also updates them by providing a clearer specification of what is to be taught and learnt on a term-by-term basis (DoBE, 2009). The DoBE (2009) further states that the National Curriculum Statement Grades R-12 replaces the Subject Statements, Learning Programme Guidelines and Subject Assessment Guidelines with the Curriculum and Assessment Policy Statements (CAPS) for all approved subjects listed in this document; National policy pertaining to the programme and promotion requirements of the National Curriculum Statement Grades R-12 and National Protocol for Assessment Grades R-12.

The report referred herein above (DoBE, 2009) further recommends that the subject advisors' roles be clarified in order to specify the nature of support they should be giving to the schools and the teachers. This recommendation then gave birth to the *Policy on the Organisation, Roles and Responsibilities of Education Districts* which provided the framework for the organisation and staffing of education district offices and the delegated authority, roles and responsibilities of education district officials for the institutions within their care (DoBE, 2013, p.4).

2.2.3.2 Synopsis of the national literature

The South African education system, in the democratic dispensation, post-1994, saw a paradigm shift from the centralised racially based education system to the development of a new organogram in education. This move saw the birth of Provincial Education Departments (PEDs) which are responsible for the implementation of norms and standards, frameworks and policies developed by the National Education Department (NED) (Christie, 2006). Furthermore, education districts that linked the PEDs and the schools were established (Bantwini & King-McKenzie, 2011; DoBE, 2013).

This part of the study interrogates factors affecting South African education district officials, particularly subject advisors' capacity to provide effective instructional leadership. The influence and support of these education district officers, in ensuring effective teaching and learning, is indispensible. Although there is ample literature on school districts and their personnel in other countries, their role in South Africa has been neglected and requires more attention (Hoadley, Christie & Ward, 2009; Bantwini & Diko, 2011).

Education district offices are pivotal in ensuring proper implementation of the departmental policies at the school level but several barriers have been cited by scholars (Chinsamy, 2002; Jansen, 2002; Hoadley, *et. al.*, 2009; Christie, 2010; Bantwini & Diko, 2011) as hindering instructional leadership practices in schools. One of the barriers is what Jansen (2002) calls *political symbolism*. Education policy makers in the post-apartheid period endeavoured changing apartheid education policies with very little attention given to the implementation plan. Jansen (2002) contends that this is the main reason why, with so many policies aimed at transforming the South African education system, little change is experienced in schools and in the classrooms. Policies are there, he further states, but there are no clear and concrete

steps towards implementation. Bantwini and Diko (2011) confirm this assertion by contending that there is a gap between policy formulation and implementation.

The DoBE (2013) also acknowledges the above shortfall. In its *Policy on the Organisation, Roles and Responsibilities of Education Districts* (DoBE, 2013), the Minister of Basic Education, Angie Motshekga, admits to the fact that some, if not most education districts are still incapable of effectively supporting schools. The researcher argues that even this policy is symbolic in the sense that the fundamental problems experienced by the Education Districts (EDs) are not addressed. EDs have no official policy guiding them on what they should do but operate within the national and provincial legislative framework (DoBE, 2013). Given the diverse nature of schools and challenges each ED has to contend with, the researcher argues that having no legislative authority defeats the envisaged quality public service that is "more capable, more professional and more responsive to the citizens' needs" (DoBE, 2013, p.6).

Bush, Joubert, Kiggundu and van Rooyen (2009) argue that improved learner outcomes can only be realised if education leaders and managers are directly involved in the core business of teaching and learning. They further posit that intervention by subject advisors is valuable for learner achievement. The researcher asserts that it is disconcerting to note that some of these education district officials do not understand their roles well and cannot perform them to a high level of efficiency (DoBE, 2013).

Furthermore, the researcher's experience as a teacher in South Africa, for more than two decades, is that some subject advisors do not give full instructional support to schools. The DoBE (2013) specifies support for schools as one of the four responsibilities of the subject advisors as the education district personnel. The support referred to in here includes class visits and classroom observations. The researcher argues that this does not happen in some schools. In most times, the support given by the subject advisors to schools is often confined to paperwork and the coverage of the work programmes. The researcher's experience is also that some subject advisors leave the evaluation of the teachers' work to other teachers. When moderation is taking place, schools exchange learners' books and assess each other's work. Teachers in the Western Cape (Daniels & Strauss, 2010) also voice the same concern and perceive subject advisors as administrators who are shifting their responsibility and workload to teachers. This, the researcher argues, compromises and neglects the quality essential for

instructional improvement because it does not assure that there is quality teaching and learning taking place in the classroom.

A study conducted by Bantwini and King-Mckenzie (2011) concluded that most South African teachers do not receive effective teacher education and therefore have challenges coming to terms with the content of their respective subjects. These researchers argue that these teachers need support in order to be effective in what they do in class. The researcher argues that subject advisors should be at the core of this support needed to assist teachers because these education district officials are supposedly the masters of their subjects. They should also encourage teachers to professionally develop themselves and also create teacher development programmes within their sphere of leadership.

Another point raised by Bantwini and King-McKenzie (2011) is the issue of many reforms and a plethora of policies bombarding the South African education system in the democratic dispensation. They argue that these reforms send confusing messages to teachers resulting in a situation where they are labelled as people who hardly know what they are doing. Having so many curriculum transformations within a period of nineteen years, the researcher posits, is also indicative of a trial and error approach the South African education system has adopted.

 A research conducted by Mafora and Phorabatho (2013) in the Eastern Cape and KwaZulu-Natal concurs with this finding as it reveals schools that have difficulty in managing and implementing NCS. The researcher asserts that the education district personnel, including the subject advisors should provide the necessary support when the new curriculum is implemented. This is consistent with studies (Mulkeen, Chapman, Dejaeghere, Leu & Brynek, 2007; DoBE, 2009; Bantwini & King-McKenzie, 2011) that view the supervision of curriculum implementation as the responsibility of the office-based education departmental officials. In this study by Mafora and Phorabatho (2013), school principals complain about not getting enough support in managing and implementing the NCS. Consistent with this finding is also the study conducted in the Western Cape by Daniels and Strauss (2010) that also blames the subject advisors for being "out of touch with what was happening in schools" (p.1389).

Teachers in some schools also experience emotional instability due to the societal problems that have a bearing on the school environment Factors such as drug abuse, HIV & AIDS,

gang violence and poverty are some of the problems influencing what goes on in the majority of the South African schools. These problems unsettle teachers because they are neither prepared nor trained for them. Daniels and Strauss (2010) argue that the above societal problems, together with others like lack of resources and overcrowded classrooms, leave teachers feeling exposed and vulnerable as schools become a hostile environment to work in. They further contend that this results in teachers taking on an apathetic attitude towards their work and only do the minimum of what is required or absent themselves from work. The Department of Basic Education (2011) in *The South African Country Report: Progress on the Implementation of the Regional Education and Training Plan,* complains about the South African teachers' absenteeism rate which was estimated at an average of ten days per teacher per annum in 2011. In 2012, according to the Minister of Basic Education, Angie Motshekga, this figure rose to nineteen (News24, 2013). Daniels and Strauss (2010) argue that the work context, within which teachers function, should be transformed into an environment that allows for effective instructional leadership. In a situation like this, leadership and support by subject advisors is essential.

2.3 Theoretical frameworks

This study is underpinned by two theories: the instructional leadership theory and the transformational leadership theory. These theories are discussed below.

2.3.1 Instructional leadership theory

Instructional leadership theory has its origins in Edmonds' (1979) study of effective schools in the poor urban communities in America. Edmonds identified strong instructional leadership skills, displayed by the school principals, as the basis for instructionally effective schools. Cuban (1984) later became one the researchers who expanded the study on effective instructional leadership to the education districts. He focused his attention on exploring the role played by the education district personnel in supporting instructional improvement at the school level.

Kruger and van Deventer (2003) posit that there is little consensus amongst scholars as to what instructional leadership really entails. Concurring with this assertion are Rorrer, *et. al.* (2008) who contend that a single, unified and agreed upon definition of instructional leadership does not exist. These different definitions, the researcher states, can also be witnessed in the terminology preferred to refer to instructional leadership in different

countries. Scholars in the United Kingdom prefer educational or pedagogic leadership (Southworth, 2002), in America, learning-focused leadership (Plecki, McCleery & Knapp, 2006) and in Australia, educational leadership (Gurr, *et. al.*, 2007). Scholars (Southworth, 2002; Kruger & van Deventer, 2003; Plecki, *et. al.*, 2006; Gurr, *et. al.*, 2007; Robinson, *et. al.*, 2008) generally agree that instructional leadership is multifaceted and incorporates a number of practices. These scholars further agree that despite the different activities, character and processes involved in instructional leadership, it is central to effective school leadership. Southworth (2002) and Kruger and van Deventer (2003) differentiate between narrow and broad views of instructional leadership. They contend that a narrow view focuses only on teachers' behaviours and staff development that enhance learners' learning and a broader view, over and above a narrow view, incorporates other organisational variables like the school culture.

Successful learner outcomes have always been the global yardstick for quality teaching and learning (Bush, Bell & Middlewood, 2002). The study conducted by Robinson, Lloyd and Rowe (2008) concludes that "the closer educational leaders get to the core business of teaching and learning, the more likely they are to have a positive impact on students' outcomes" (p.664). There are many models of Instructional Leadership theories. Below is a discussion of two of these models.

2.3.1.1 Hallinger and Murphy's model

This model of instructional leadership came as a result of the study of principals' behaviour in ten elementary schools in one district in California. The primary goal of the study was to analyse the instructional management behaviours of the principals in line with their responsibilities as the principals. Hallinger and Murphy's (1985) intention was to develop an instrument that can be used to measure the principals' management instructional behaviours.

Hallinger and Murphy (1985) identified two levels of the instructional leader's intervention in instructional improvement. There is indirect involvement where the principal monitors and enforces school policies and practices associated with them. This type of involvement allows the principal to influence all activities taking place in the school and represents school wide expectations that shape teachers' and learners' behaviours. Indirect behaviours consume less principal's time but need the staff commitment to the school policy even if the principal is not visible (Hallinger & Murphy, 1985).

The direct involvement consists of the principals behaviour performed in relation to individual teachers and learners. These activities can be in the form of a direct one-on-one interaction with either the teacher or the learner with the aim of improving instruction. This type of intervention is more effective than the indirect one because it addresses the specific needs of an individual, however, it consumes more time and requires a certain degree of technical skills from a principal. The argument here is not about which intervention strategy is the best but a wise instructional leader finds the balance between the two by taking other contextual factors into consideration as well (Hallinger & Murphy, 1985).

Hallinger and Murphy (1985) concluded that studies about instructionally effective schools suggest that the principal's instructional management role can be divided into three dimensions namely: defining the school's mission, managing the instructional programme and promoting a positive learning climate. Following in **Table 1** is the illustration of Hallinger and Murphy's (1985) appraisal instrument of the principal's management behaviour.

Defines the Mission	Manages Instructional Program	Promotes School Climate
▪ Framing school goals ▪ Communicating school goals	▪ Supervising and evaluating instruction ▪ Coordinating curriculum ▪ Monitoring student progress	▪ Protecting instructional time ▪ Promoting professional development ▪ Maintaining high visibility ▪ Providing incentives for teachers ▪ Enforcing academic standards ▪ Providing incentives for students

Table 1: Dimensions of Instructional Management (Hallinger & Murphy, 1985, p. 221)

Hallinger and Murphy (1985) argue that defining and communicating the school's mission is the responsibility of the principal as the instructional manager. The principal should be able to

communicate to all the stakeholders what the school wishes to accomplish. This should be done mainly for the shared purpose and ownership of the vision. The principal should be able to clearly define goals that focus on the learner achievement. He/she should identify areas of focus and the resources essential for instructional improvement in a given school year. The past and the present learners' performance can assist in focusing on the goals to be achieved. The input from all the other stakeholders should also be invited (Hallinger & Murphy, 1985).

Managing instructional programmes involves the principal working directly with teachers in areas specifically related to curriculum and instruction (Hallinger & Murphy, 1985). The principal should be able to supervise and evaluate instruction. School goals should be translated into the classroom. Instructional support should be given to teachers through class visits and feedback. The principal should be able to coordinate the content taught in class and achievement tests. These tests, Hallinger and Murphy (1985) assert, should be used for diagnosing weaknesses, setting of goals, assessing the curriculum, evaluating instruction and measuring progress towards school goals.

Promoting a positive learning climate according to Hallinger and Murphy (1985) refers to all the instructional leader's activities towards protecting instructional time, promoting professional development, maintaining high visibility and providing incentives for learning. They assert that principals can influence teachers' and learners' attitudes by rewarding academic achievement and productive efforts. Other factors that can reinforce academic achievement, according to these scholars, are: making the school expected standards clear and explicit, careful use of school time and the selection and the implementation of high quality staff development programmes.

2.3.1.2 Weber's model
Weber (1996) argues that school leadership has evolved from being autocratic to a shared one where decisions are made as close to the point of implementation as possible. However, he emphasises on the need for instructional leadership regardless of the structure and the hierarchical nature of the school. He identifies five dimensions of instructional leadership, namely: defining the school's mission; managing curriculum and instruction; promoting a positive learning climate; observing and improving instruction and assessing the instructional program. Following in **Table 2** is a summarised version of Weber's (1996) Instructional Leadership model.

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Defining the School's Mission	Managing Curriculum and Instruction	Promoting a Positive Learning Climate	Observing and Improving Instruction	Assessing the Instructional Programme
▪ Collaboratively develops a shared vision and common goals for the school.	▪ Monitors classroom practice and offers advice in line with the school's mission. ▪ Provides resources. ▪ Makes evidence-based decisions to inform instruction. ▪ Implements participative management.	▪ Communicates goals and high expectations. ▪ Establishes an orderly learning environment. ▪ Increases teacher commitment.	▪ Uses classroom observation to improve instruction. ▪ Emphasises on the professional development of teachers.	▪ Uses assessments to evaluate the effectiveness of the curriculum and also to plan and design future programmes.

Table 2: Summarised dimensions of Weber's (1996) Instructional Leadership model

Weber (1996) refers to defining the school's mission as a dynamic process of inviting all the stakeholders in crafting a clear and honest mission for the school. This mission should bind everybody within the school community to a common vision. He asserts that an instructional leader gives direction, purpose and meaning to the instructional programmes. The instructional leader provides opportunities where common values and school expectations are discussed in order to create a shared mission for the school.

Weber (1996) contends that the school's mission can be seen in the manner in which the curriculum and instruction is managed. He states that through classroom observations, an instructional leader can provide informed advice and resources that can best address the school's mission. He further argues that an instructional leader encourages teachers to conduct research in order to make informed decisions about instructional improvement. Weber (1996) encourages participative leadership because, he argues, it acknowledges teachers' contributions and that will impact positively on instructional improvement.

A learning climate comprises beliefs, values and attitudes that all the stakeholders have about learning (Weber, 1996). Instructional leaders create a positive learning climate by communicating goals and establishing high expectations for performance. He/she protects contact time and rewards success. He/she establishes an orderly learning environment with clearly understood disciplinary expectations and increases teacher commitment by motivating them to share the school's major instructional values and goals (Weber, 1996).

Observing and improving instruction begins with the instructional leader establishing trust and respect between the observer and the observed. Weber (1996) argues that observations must be reciprocal and should emphasise on everyone's development. In other words, both parties involved should gain valuable experience for professional development and innovations. Instructional leaders should emphasise on research as the stimuli for improvements in instructional programmes (Weber, 1996).

Weber (1996) contends that deliberate and on-going assessment of instructional programmes is crucial for instructional improvement. Instructional assessment provides information for planning, revising, designing and administering instructional programmes. It also provides the school with an opportunity for refinement towards meeting learners' needs.

For the benefit of this particular study, Weber's (1996) Instructional Leadership model will be adopted mainly because the researcher is of the opinion that it incorporates more essential qualities needed for an instructional leader than what Hallinger and Murphy's (1985) model does. The researcher argues that both the above discussed instructional leadership models were arrived at through research about instructional leaders and their empowerment, however it must be noted that the qualities alluded to are ideal and there is no guarantee that an

instructional leader who demonstrates them can have a positive impact on learners' performance.

2.3.1.3 Implications for the subject advisors

As instructional leaders, subject advisors are expected to be knowledgeable and display competency in a number of skills. These include knowledge of the curricula, pedagogy, student and adult learning and skills in change management, group dynamics and interpersonal relations and communications" (Southworth, 2002, p.86). Southworth further contends that qualities and attributes like high energy levels, resilience, determination, empathy and optimism are also essential for effective instructional leadership. The researcher argues that the literature reviewed above indicate that certain organisational conditions are essential for instructional leadership to be effective. Subject advisors must be able to identify or create hospitable environments and collaborate with teachers under their leadership in ensuring instructional improvement in their schools.

2.3.2 Transformational leadership theory

This theory was coined by James McGregor Burns (1978) who introduced the concept of transforming leaders in the field of politics. He defined transformational leadership as a process in which leaders and followers help each other to achieve motivation and high morale. Transformational leaders, according to Burns (1978), establish a relationship of common stimulation and elevation that turns followers into leaders. He further argues that this mutual relationship, motivation and high morale transform organisations because the capacity of working in collaboration towards a common vision is developed.

Later Bass (1985) extended Burns' (1978) theory of transformational leadership into the education sector and was well received by the educational community as a reaction towards the top-down policy approach of that time. Bass (1985) is convinced that transformational leadership can increase the commitment of the staff and their belief in the organisation and that in turn can yield better performance. He argues that a transformational leader's authenticity can be measured in terms of his/her impact on the followers' motivation and performance. He further asserts that followers of such a leader are willing to go an extra mile in their duties because of the respect, trust, loyalty and admiration they have for him/her.

Bass (1985) identifies four elements that characterise a transformational leader, namely: individual consideration; intellectual stimulation; inspirational motivation and idealised influence. Following is the discussion of these elements as cited in Bass (1985).

2.3.2.1 Individualised consideration

This denotes giving personal attention to individual members of the organisation. A transformational leader attends to the needs and concerns of the followers. A leader is a mentor and gives support and empathy to the followers. Communication is kept open and the need for mutual respect is emphasised. Followers are intrinsically motivated and aspire for more self-advancement in the organisation. A transformational leader respects and appreciates an individual member's contribution to the team (Bass, 1985).

2.3.2.2 Intellectual stimulation

This refers to the positive manner in which the leader challenges the followers' ideas. Transformational leaders stimulate ingenuity amongst the followers. Independent thinking followers are nurtured and developed and are encouraged to view any problem and an unexpected situation as a challenge and an opportunity to learn. A leader encourages followers to think critically, ask questions and figure out better and easier ways of executing their duties (Bass, 1985).

2.3.2.3 Inspirational motivation

This is typified by a leader articulating an inspiring and appealing vision to the followers. A transformational leader communicates organisation's goals, provides a sense of purpose and challenges followers with high standards. Such a leader should possess good communication skills to be able to paint a very clear, precise and powerful vision that will create optimism, amongst the followers about their future and the future of their organisation (Bass, 1985).

2.3.2.4 Idealised influence

A transformational leader should be a role model with high ethical behaviour and a stable moral foundation. Such a leader should have a clear set of values that appeal to the followers' emotions. A leader should model behaviour through personal achievement, character and conduct (Bass, 1985).

2.3.2.5 Implications for the subject advisors

Leadership is shared. Subject advisors should work with schools in creating the environment that is conducive to teaching and learning. Hallinger (2003) argues that the behavioural components such as individual support, intellectual stimulation and personal vision suggest that transformational leadership model is grounded in the understanding of the needs of individual teachers within individual schools. Furthermore, Hallinger (2003) asserts that subject advisors, as transformational leaders, should create a climate in which teachers engage in continuous self-empowerment and in which they continuously share their learning and experiences with others.

2.4 An overview of the reviewed literature

Although some scholars (Chubb & More, 1990; Elmore & Burney, 1997) argue against the education districts' role in instructional improvement, there is enough evidence in literature (Corcoran, Fuhrman & Belcher, 2001; Sykes, Schneider, Plank & Ford, 2009; Hoadley, *et. al.,* 2009) to argue differently. There is also consensus on the viewpoint that education districts have not reached their potential in terms of support that they give to schools. Some scholars like Sykes, *et. al.* (2009) contend that current structures and roles in education districts were developed to serve certain functions rather than instructional improvement. They assert that these structures are political and administrative in nature and were established to manage growth and the establishment of the school system and learner performance was not at the core. In other words, they contend that instructional leadership was initially viewed more as a control tool rather than for the development.

Honing, Copeland, Rainey, Lorton and Newton (2010) argue that in the past, various school improvement efforts have either struggled or failed because of the lack of support from the education districts. In concurring, Sykes, *et. al.* (2009) argue that there is evidence that education districts can have a positive effect on matters of teaching, curriculum and assessment and the failure of school reforms can be laid squarely at the feet of these administrative offices.

Honing, *et. al*. (2010) state that policy overload is another impediment that the education district offices are experiencing. They argue that these policies yield disappointing results because of limited education district office participation in their implementation. This, they argue, could be because there is an overload of these policies or because education district

offices are not part of the formulation processes. A similar trend is also identified in education districts in South Africa that have no original powers prescribed by law but operate in terms of national or provincial legislation or delegation (DoBE, 2013).

At the continental level, the literature also points to the lack of support from the education district officials. As mentioned earlier in this study, the decentralisation gave education districts the responsibility of ensuring that proper teaching and learning take place in schools within their jurisdiction. Subject advisors are core to ensuring that this problem is addressed, if effective instructional leadership is to be realised. Most studies consulted continentally, cite poor instructional supervision, lack of proper support and planning by these departmental officials.

The national literature reviewed in this study reveals that most education districts are still not capable of providing effective instructional improvement in the schools within their jurisdiction. Many problems that act as barriers towards effective teaching and learning are still not adequately addressed. The DoBE (2013) also acknowledges that it cannot yet ensure that "schools meet national standards of infrastructure, services, equipment, learning materials, IT connectivity and teaching quality" (p. 9). The researcher argues that subject advisors cannot be viewed in isolation but as the personnel of the education districts that have difficulty in fulfilling their obligations.

In the researcher's interrogation of the literature, globally, the following similar train of thoughts by scholars were identified: first, schools are unique and instructional leaders should take that into cognisance when devising strategies towards instructional improvement (Coburn & Talbert, 2006; Childress, *et. al*., 2007; Hallinger, 2009; Tan, 2012), second, instructional leaders must set high expectations and standards in their schools as this will challenge stakeholders to perform to the best of their abilities (Coburn & Talbert, 2006; Childress, *et. al*., 2007; Tan, 2012), third, instructional leaders must be goal-oriented. The schools' vision and mission must be communicated to all the stakeholders for ownership and support (Gurr, *et. al*., 2007; Hallinger, 2009), fourth, an action research, by instructional leaders, is essential in identifying problems hindering instructional improvement. This will also be complemented by proper assessment strategies that will inform the instruction improvement programmes. These programmes must also be closely monitored and supported by leaders (Coburn & Talbert, 2006; Childress, *et. al*., 2007; Tan, 2012), fifth, professional

learning communities must be encouraged by the instructional leaders in order to promote professional development of teachers (Zammit, Sinclair, Cole, Singh, Costley, a'Court, & Rushton, 2007; Hallinger, 2009; Bantwini & King-McKenzie, 2011) and last, for instructional leadership to be realised, other conditions must also be taken into consideration. These conditions could be, for instance, the creation of a positive school culture, incentivising teaching and learning and involving other stakeholders outside education but who have interest in education matters (Niane, 2003; Daniels & Strauss, 2010).

Generally speaking, the literature reviewed above, at all levels (internationally, continentally and nationally), the researcher argues, features mostly what education district officials ought to do towards instructional improvement and less is argued about what they actually do. The researcher aims at establishing exactly what subject advisors do when executing their daily duties and also at understanding their experiences as they do so. It is hoped that this study will assist education authorities in educational policy formulation and also open grounds for further research.

2.5 Chapter summary

This chapter reviewed literature on the role of instructional leaders in supporting instructional leadership practices in schools. The researcher started by analysing international literature. That analysis was followed by the investigation of the continental literature and then the national literature was explored. The chapter then looked at the theoretical frameworks underpinning the study. In conclusion, the researcher drew similarities from different scholars about the role of instructional leaders as articulated above. The next chapter will look at the research methodology and the research design.

CHAPTER THREE
RESEARCH DESIGN AND METHODOLOGY

3.1 Introduction

The preceding chapter interrogated what different scholars pronounce on the role of subject advisors in supporting instructional leadership in schools. It provided an extensive review on what researchers articulate internationally, continentally and nationally. It also focused on the theoretical underpinnings of this study. In this chapter, the researcher provides a theoretical justification for the research design and methodology utilised in the research process. That is achieved by articulating the design of the study and the research methodology. Furthermore, details about sampling, data generation and analysis, trustworthiness, ethical issues and the limitations of the study are explored.

3.2 Research design and methodology
3.2.1 Research design

A research design elaborates on the specific plan for conducting a research. Leedy and Ormrod (2010) view research designing as planning. They argue that it provides an overall structure for the procedures to be followed by the researcher in data generation and analysis. Expressing a similar view are Cohen, *et. al.* (2011) when defining a research design as a process of oparationalisation which specifies "a set of operations or behaviours that can be measured, addressed or manipulated" (p.126). This means, they further argue, that the research questions expressed as a matter of interest are now investigated in concrete terms. Nieuwenhuis (2007), in concurring with the above assertions, also argues that a research design is a plan or strategy that moves from the underlying philosophical assumptions to specifying the selection of the participants, data generation techniques and methods of data analysis. According to Johnson and Christensen (2012) there are three approaches to a research and those are quantitative, qualitative and mixed research. This is a qualitative study because it analysed the role of the subject advisors, as instructional leaders, with the aim of exploring their experiences (Dane, 2011).

Creswell (2012) argues that there are eight different types of research designs, namely; experimental, correlational, survey, grounded theory, ethnographic, narrative research, mixed methods and action research designs. This is a case study which is part of an ethnographic

design as articulated by Creswell (2012). According to Cohen*, et. al.* (2011) a case is a bounded system. A system, they further argue, refers to interrelated elements within an organised whole. By bounded they mean that this system has boundaries and a case should be identified as what happens within these boundaries. This study focused on the experiences of individuals rather than a cultural group as it happens in other ethnographic studies (Creswell, 2012). In Yin's (2008) view, the researcher, in a case study, studies a case in its context by exploring it deeply. Cohen*, et. al.* (2011) argue that a case study provides a unique example of real people in real situations. The case in this study was the education district office and the study explored subject advisors' experiences, as the education district personnel, as they support instructional leadership practices in the schools under their jurisdiction. Although subject advisors' experiences were explored looking at them as individuals, their experiences formed part of a bounded system i.e. what was happening within their education district. A case study is a specific instance that is frequently designed to illustrate a more general principle (Cohen*, et. al.*, 2011)

3.2.2 Research methodology

Gough (2000) posits that methodology refers to a theory of producing knowledge as well as providing reasons for using particular techniques. He further argues that this is influenced by the researcher's understanding of the world and its social and physical attributes. Concurring with Gough is the following contention:

> ...methodology is a bridge between our philosophical standpoint (ontology and epistemology) and methods; it is related to how we carry out our research. Methodologies are derived from our assumptions about the nature of existence (ontology) and are also linked to our viewpoint on the nature of knowledge-building (epistemology), which guides how we produce knowledge and decisions about how we engage methodically (theoretically) with the concrete social world, including the methods we select to answer problems.
>
> (Hasse-Biber & Leavy, 2011, p.38)

In this study, research methodology refers to how the research unfolded as well as the logical sequence involved. The main focus was to explore the subject advisors' experiences in supporting instructional leadership practices in schools. Hasse-Biber and Leavy (2011) argue that the researcher's philosophical foundation impacts on every aspect of the research process including the topic selection, question formulation, method selection, sampling and research

design. In concurring with this assertion, the researcher asserts that one's ontological and epistemological assumptions about a particular phenomenon greatly influence one's choice of the research topic and one's methodological theories.

3.3 Research paradigm

Paradigms represent what we think about the nature of the universe. Dane (2011) describes a paradigm as a logical system that encompasses theories, concepts, models, procedures and techniques. Similarly, Nieuwenhuis (2007) defines a paradigm as a set of assumptions or beliefs about the fundamental aspects of reality which gives rise to a particular world view. Hasse-Biber and Leavy (2011) differentiate between three major methodological approaches (paradigms) to a qualitative study and those are post-positivist, interpretive and critical paradigms. This study is located within an interpretive paradigm which endeavours to understand the subjective world of human experience (Cohen, *et. al*., 2011). Hasse-Biber and Leavy (2011) argue that this paradigm values experiences and perspectives as important sources of knowledge. They further contend that the only way of understanding social reality is from the perspectives of those enmeshed in it. Nieuwenhuis (2007) reinforces this assertion by contending that in an interpretive paradigm, "human life can only be understood from within" (p.59). In this study, subject advisors narrated their own experiences and understandings of their interaction with other stakeholders in supporting instructional leadership practices in schools.

3.4 Sampling

Nieuwenhuis, J. (2007) argues that sampling refers to the process used to select participants. When we sample, we study the characteristics of a subset (sample) in order to understand the characteristics of a bigger group (Johnson & Christensen, 2012). Hasse-Biber and Leavy (2011) argue that the logic behind the qualitative research is concerned with in-depth understanding of the meaning individuals attribute to their given social situation. This study explored the subject advisors understanding of their work environment.

Out of the probability sampling and non-probability sampling identified by Cohen, *et. al*. (2011) as two types of sampling in a research, this study adopted purposive sampling which is a type of non-probability sampling that targets particular participants, not for the purpose of representing a wider group but for their in-depth knowledge (Cohen, *et. al*., 2011) relevant to

respond to the research questions. The researcher, in this study identified four subject advisors from one education district in KwaZulu-Natal as the participants precisely because of their in-depth knowledge and vast experience about their education districts' role in supporting instructional leadership practices in schools. These subject advisors were selected precisely because they were the holders of the data needed to answer the key research questions in this study.

3.5 Data generation methods

Data is the information or evidence generated systematically from an environment to provide an evidential base from which to make interpretations and statements intended to advance knowledge and understanding concerning research questions or a problem (Lankshear & Knobel, 2010). Cohen, *et. al.* (2011) define methods as a range of approaches used in educational research to generate data which is to be used as the basis for inference and interpretation, for explanation and prediction. They further assert that methods refer to techniques and procedures used in the process of data generation.

According to Cohen, *et. al.* (2011) there are several data generation instruments and those are interviews, questionnaires, observation, tests, accounts, biographies and case studies, role-playing, simulations and personal constructs. They posit that the decision on which instrument (method) to use is determined by which kind (methodology) of research to undertake. Johnson and Christensen (2012) state that qualitative researchers usually generate data by conducting observations and in-depth interviews. In line with this argument, the researcher in this study used interviews where the participants described their consciousness and experiences of the phenomenon (Johnson & Christensen, 2012). To corroborate the participants' articulations, documents were also reviewed. Johnson and Christensen (2012) argue that qualitative methods like interviews and document reviews are used when depth into a phenomenon is required and this involves generating textual or verbal data. The methods (instruments) used in this study to generate data are further discussed below.

3.5.1 Interviews

Creswell (2012) argues that qualitative interviews occur when researchers ask one or more participants general open-ended questions and record their responses. These open-ended questions, he further argues, allow the participants to voice their experiences unconstrained

by any perspectives of the researcher or past research findings. Concurring with this assertion are Cohen, *et. al.* (2011) by articulating that the interviews allow the participants to discuss their interpretations of the world in which they live and express how they regard situations from their own point of view. They further contend that the conversation in an interview is initiated by the interviewer with the specific purpose of generating information responding to the research questions.

Interviews have certain advantages for the researcher. Bell (2005) recommends interviews for their adaptability. She asserts that a skilful interviewer can follow up on ideas, probe responses and investigate motives and feelings. The manner in which responses are articulated, she further states, like the tone of the voice, facial expression and hesitation, can provide certain information for the researcher. Cohen, *et. al.* (2011) concur with this assertion by stating that interviews allow for greater depth into a phenomenon than with any other methods of data generation. Another advantage, as articulated by Creswell (2012), is that interviews can allow the researcher control over the type of information generated in that specific questions can be asked to elicit particular information.

Like any other research method, interviews also have their disadvantages. Bell (2005) and Creswell (2012) assert that interviews can be subjective and biased. They contend that this method of data generation can be deceptive and can only provide what the interviewee wants the researcher to hear. Another disadvantage, as further articulated by both these scholars, is that successful interviews are dependent on the experience and or skills of the researcher, for example, careful preparation and the ability to encourage the participants to talk.

Creswell (2012) identifies four types of interviews which are one-on-one interview, focus group interview, telephone interview and e-mail interview. The researcher in this study utilised one-on-one interview by asking questions and recording answers from only one subject advisor at a time (Creswell, 2012). As articulated by Johnson and Christensen (2012), the researcher was the primary data generation instrument by personally interviewing the participants and that is in line with any qualitative study.

Cohen, *et. al.* (2011) distinguish between structured, unstructured and semi-structure interviews. This study used semi-structured interviews to generate data. Lankshear and Knobel (2010) contend that semi-structured interviews lie halfway between structured and

unstructured interviews in the sense that the researcher prepares questions that will be used as a guide and will follow up on relevant comments and probe important themes emerging from the participants' responses. In this study similar interview schedule was used for all the participants and their responses were recorded and later transcribed for analysis purposes. Lankshear and Knobel (2010) argue that a general rule of thumb is one hour when interviewing adults so as not to impose too much on their time. In this study, each interview lasted approximately 45 minutes.

3.5.2 Documents review

Johnson and Christensen (2012) recommend the use of multiple methods and multiple data sources as an approach for the case study methodologists. In response to that, the researcher used documents reviews as a supplement of information generated by interviews. Cohen, *et. al.* (2011) define a document as a record of an event or a process. These records, they argue, can be compiled either for an individual or for a group purpose. Creswell (2012) contends that documents such as the newspapers, minutes of meetings, personal journals, official memos and letters can provide valuable information in helping researchers in understanding the central phenomenon in a qualitative study. The researcher reviewed, amongst other documents, subject advisors' year programmes, attendance registers of the workshops conducted, learners' results analysis and curriculum monitoring instrument for school visits.

Manuscript sources can, on one hand, provide an advantage of being in the language and the words of the participants and be ready for analysis without the need for transcription but, on the other, can be incomplete, inauthentic and inaccurate (Creswell, 2012). Bell (2005) differentiates between two types of documents during an educational research which are non-written sources like photographs, videos, slides, films, *etcetera* and written or manuscript sources like policies, minutes of the meetings, work programmes, *etcetera*. The document review process in the study concentrated mostly on the manuscript sources. The documents reviewed were recorded in the document summary form. The content of this form included the name of the document, the date on which the document was created, the significance of the document in relation to the study and a brief summary of the contents of the document. Similar document summary forms were used for all the participants. The discussions about these documents were also recorded.

3.6 Data analysis

Lankshear and Knobel (2010) posit that before data could be analysed, it needs to be suitably prepared and organised by turning it into a written text (transcript). They refer to data analysis as the process of organising these pieces of information systematically by identifying their key features or relationships (themes, concepts, beliefs, etc.) and interpreting them. Cohen, *et. al.* (2011) argue that a researcher needs to consider how the data will be analysed as this has a direct bearing on the instruments to be used. Data analysis is also informed by categories developed from the researcher's theoretical frameworks as well as concepts identified by a researcher's literature review (Lankshear & Knobel, 2010). The analysis, they further argue, is also directly related to the research questions.

Cohen, *et. al.* (2011) further state that the researcher needs to first determine what needs to be done with the data when it has been generated, second, how will it be processed and analysed and third, how will the results of the analysis be verified, cross-checked and validated. They further assert that the criteria for deciding which forms of data analysis to undertake are governed both by fitness for the purpose and legitimacy. In other words they contend that the form of data analysis must be appropriate to the kind of data generated.

Written data should be reduced to manageable and comprehensible proportions and this should be done in a way that that does not interfere with the quality of the data generated (Cohen, *et. al*., 2011). The researcher in this study saw content analysis as a way of analysing data that ensured that the above assertion was achieved. Leedy and Ormrod (2010) assert that content analysis is a detailed and systematic examination of the contents of a particular body of material for the purpose of identifying patterns, themes or biases. In line with the above assertion, Lankshear and Knobel (2010) define content analysis as a method that uses a set of procedures to make valid inferences from text. They argue that content analysis is concerned with the kind of messages the texts send and with the social norms and ideologies these messages encode. A key assumption underpinning content analysis is that:

> ...frequent use of particular words, or a particular form of wording, and a particular form of vocabulary - or discourse - carries information about worldviews, ideologies and social contexts at the time the text was produced.

<div align="right">(Lankshear & Knobel, 2010, p.333)</div>

Cohen, *et. al.* (2011) view content analysis as a strict and systematic set of procedures for the rigorous analysis, examination and verification of the contents of written data. By this they mean coding, categorising (creating meaningful categories into which the units of analysis – words, phrases, sentences etc. – can be placed), comparing (categories and making links between them), and concluding – drawing theoretical conclusions from the text (Cohen, *et. al.*, 2011). After transcribing the data, the researcher summarised the inferences from the text, looked for patterns, regularities and relationships between segments of the text, and tested hypotheses. Data was coded according to categories. After that, on the basis of the evidence, the researcher posited some explanations for the situation, some key elements and possibly even their causes (Cohen, *et. al.*, 2011).

To verify, cross-check and validate generated data, the document summary forms were analysed to identify any corroborations with the data from the interviews. Finally, data was presented in the form of the research findings.

3.7 Issues of trustworthiness

Lankshear and Knobel (2010) argue that trustworthiness is concerned with believability of the study and the degree to which a reader has faith in the study's worth. They further contend that the overall logic of the research questions, theoretical framework, data generation and analysis must be justified and appropriate. They also assert that the researcher needs to meet sufficiency and coherence in order to generate trustworthiness in a research. By sufficiency they mean the amount of data collected and evidence to support interpretations. Coherence, they argue, means providing detailed accounts of research decisions and the justifications thereof. While case studies, generally, may not have the external checks and balances that other forms of research enjoy, nevertheless they still abide by standards of validity and reliability (Cohen, *et. al*., 2011). This study presented a logical chain of evidence (Yin, 2008) that is required of any case study and which can be tracked from its inception to the conclusion.

The researcher, in this study used theory triangulation (Johnson & Christensen, 2012) to ensure the trustworthiness of the findings. Instructional leadership theory and transformational leadership theory were used to interrogate and explain the subject advisors' role in supporting instructional leadership practices in schools. These two theories provided

the researcher with more insight that helped in developing cogent explanation (Johnson & Christensen, 2012). Furthermore, triangulation was used as a method of data generation. In addition to the interviews conducted with the participants, documents were reviewed to support the findings. Combining two methods of data generation produced better and more evidence.

The choice of four different subject advisors as participants in this study also assisted the researcher in drawing conclusions looking at the phenomenon from the different points of view. This is what Johnson and Christensen (2012) term *replication logic*. They argue that if the findings are replicated with different kinds of people, they can be generalised beyond the people in the original research study. Lastly, participant feedback (Johnson & Christensen, 2012) was implemented to validate the accuracy of the findings. This means that the conclusions that were reached from the data collected were shared with the participants to clear up any miscommunications.

3.8 Ethical issues

Lankshear and Knobel (2010) posit that ethics is concerned with ensuring that the interests and well-being of the participants are not harmed as a result of the research being conducted. Johnson and Christensen (2012) argue that research ethics are a guiding set of principles that assists researchers in conducting ethical studies. These principles, they further argue, ensure the participants' right to privacy in a research which includes confidentiality, anonymity, withdrawal or termination of involvement as well as access to information. Durrheim and Wassenaar (2002) state that all research studies must follow certain ethical principles which are autonomy (free participation and the right to withdraw), non-maleficence (do no harm) and beneficence (be of benefit). Cohen, *et. al.* (2011) identify three main spheres of the ethical issues which are informed consent, confidentiality, and the consequences of the interviews.

All ethical issues were observed in this study. Ethical clearance from the University of KwaZulu-Natal was granted. The permission was granted by the Department of Basic Education to conduct this study in one of their education districts. Letters were also sent to the participants informing them about the study, its purpose and requesting their participation in it. These letters assured them of anonymity, confidentiality and the right to withdraw at any

time. The participants were also assured of the access to the research findings which hopefully would contribute positively to the work of subject advisors. Consent forms were also signed by the participants declaring their willingness to take part in the research and understanding of the conditions thereof.

3.9 Limitations to the study

Case studies have limited generalisability (Cohen, *et. al*., 2011). Yin (2008) argues that a case study is not so much concerned about generalisation but the approach is the analysis of a small sample. He asserts that case studies can be the basis of other similar case studies and should be treated as a growing pool of data that can ultimately contribute to greater generalisability. He further contends that the assumption that generalisation is only from a sample to a larger population is inapplicable to case studies as they help to generalise to broader theories that can be tested in one or more other empirical cases.

Another limitation was that data generated through interviews can sometimes be contrived (Lankshear & Knobel, 2010). To mitigate this limitation, the researcher reviewed the documents relevant to this study in order to authenticate what the subject advisors were articulating on their roles as instructional leaders in schools.

3.10 Chapter summary

This chapter discussed the research design, the methodology and methods of data generation utilised in this study. Other areas of relevance dealt with in this chapter were sampling, data analysis, trustworthiness, ethics and the limitations of the study. The next chapter will present and discuss data generated through interviews and documents reviews.

CHAPTER FOUR
DATA PRESENTATION AND DISCUSSION

4.1 Introduction

The preceding chapter focused on the research design and methodology underpinning this research study. This chapter presents and interrogates the data generated through interviews and documents reviews. In analysing this data the researcher utilises the key research questions indicated in Chapter One as well as the literature reviewed and theoretical frameworks adopted in Chapter Two. Trends, patterns and themes emerging from data analysis are identified and critically discussed. This discussion then forms the basis for certain possible conclusions which shall be presented in the following chapter.

4.2 Discussion of the findings

All the research participants were asked the same interview questions to enhance reliability and validity of the findings. The participants knew that the researcher is a seasoned teacher and could have the knowledge of how the subject advisors operate so they had no reason not to trust the researcher with the required data. That also contributed to the trustworthiness of the findings. To corroborate the participants' utterances, documents not older than five years were reviewed by the researcher. The data generated from the participants is presented below according to themes and categories as guided by the key research questions. Direct quotations are used to substantiate the findings and these quotations are presented in *italics*.

4.2.1 Biographical details of the participants

Prior to the interviews, the participants who were all subject advisors, were requested to provide their brief biographical details that the researcher thought were relevant to this study. The researcher believes that such information influenced the participants' perceptions of their roles as instructional leaders. Following is **Table 3** with that biographical information. Pseudonyms are used to ensure that participants remain anonymous as part of an ethical requirement.

Details	Mr Brown	Mrs Glen	Mr Groove	Mr Lock
Position held	Deputy Chief Education Specialist	Deputy Chief Education Specialist	Chief Education Specialist	Senior Education Specialist
Highest qualification in the subject	BA & HDE (History)	BA (Hons) (African Languages)	M Sc (Mathematics)	BA (English)
Years of experience in the position	7	7	8	5

Table 3: Biographical details of the participants

The table above reflects the qualifications and the experiences that the participants have in their respective positions. All the participants had degrees in their subjects and that suggests, to the researcher, that they are all adequately qualified to hold their positions as subject advisors. Being exposed to their roles and responsibilities for five or more years, provided them with hands-on experiences of the nature and the responsibilities that come with their positions. The combination of their professional qualifications and cumulative experiences further suggest, to the researcher, that they have accumulated remarkable expertise and are familiar with the phenomenon of instructional leadership required to support their schools. It is worth noting, however, that the information in the table above and the interpretation by the researcher thereof, did not guarantee the transformation of the knowledge acquired by the participants into a positive contribution in instructional leadership practices in schools under their jurisdiction.

4.2.2 Subject advisors' understanding of their roles as instructional leaders
The findings from all the participants suggested that they understood their roles to be that of supporting teachers in the implementation of the curriculum. This support manifested itself in the form of workshops and school visits. The workshops were aimed at improving the teachers' content knowledge of their subjects as well as the methodologies and assessments associated with them. This suggestion was supported by Mr Brown's response:

>*My role basically is to visit schools so that I can support them in as far as the*
>*curriculum is concerned. I guide them so that they make sure that they*

> *implement the curriculum correctly… I check if the educators attend our workshops because at the beginning of the year we have orientation workshops so that teachers know what to expect for the whole year.* (Mr Brown)

The above sentiment was also shared by Mrs Glen who had a similar view about her role as a subject advisor:

> *My main role as a subject advisor is to make sure that teachers understand the curriculum… and I do that through work-shops and school visits… looking at the methodology … and the subject content.* (Mrs Glen)

As part of triangulation, the documents reviewed confirmed that Mr Brown held one of his orientation workshops on the 22nd of January 2013. That was corroborated by the attendance register signed by teachers from three different circuits on that day. According to that workshop's programme, previous year's results were analysed and resources in the form of documents were handed out to teachers. Teachers were also workshopped on what was expected of them in class. Mr Brown held his orientation workshop on the 21st of February 2014 and Mrs Glen's workshop on CAPS was on the 25th of January 2013 with twenty six teachers attending and signing the attendance register. According to the programme for that workshop, CAPS documents were issued out to teachers and teachers were workshopped on the implementation of the new curriculum.

The above articulations by the two participants are in line with the assertion that the core function of the subject advisors is to monitor and support the quality of teaching and learning in their schools (De Grauwe, *et. al*., 2005). Also concurring with these participants are Mulkeen, *et. al.* (2007); Bantwini and King-McKenzie (2011) and the DoBE (2013) who view the supervision of the curriculum implementation as the role of office-based education departmental officials. Also sharing the same sentiment is Hallinger (2009) who posits that an instructional leader must be capable of supervising and evaluating instruction, coordinating the curriculum and monitoring learners' progress. All the above activities as pronounced by the participants seem to be in line with Weber's (1996) model of instructional leadership when asserting that an instructional leader should be able to manage the curriculum and instruction in line with the school's mission.

Another finding was that when visiting schools, the participants had certain expectations from the subject teachers. Mr Brown said:

> *When visiting a school, I carry a school visiting form that requires the details of the educator, the date, the name of the subject and other requirements like the availability of teacher's time table, work schedule, lesson plans, assessments, proof of workshop attendance, etcetera.* (Mr Brown)

A document, titled 'Curriculum Monitoring Instrument' confirmed Mr Brown's school visit dated 27 February 2013 where a particular teacher was assessed using that instrument. Certain areas concerning the teacher's performance were scrutinised and comments were made either applauding the teacher or advising for improvement.

Another role articulated by all the participants was that of analysing results and coming up with improvement strategies. Mr Groove articulated:

> *I spend a lot of time analysing it* (results) *in the month of January looking at what went wrong and how to improve it.* (Mr Groove)

Sharing the same view was Mr Lock who said:

> *… I do the analysis of results at the beginning of the year in my subject to assist those schools that did not perform well and also to encourage those that performed well to keep the momentum.* (Mr Lock)

Mr Lock showed the researcher the result analysis for grade 12 NSC results for 2012 dated 17 January 2013. That analysis listed all the schools under his supervision in his district. Next to the name of each school was the number of learners that wrote the final exam in Mr Lock's subject, the percentage pass the school obtained in the subject as well as the number of learners that obtained a particular rating.

This finding is in line with Childress, *et. al.* (2007) who assert that allocating resources to schools and the effective teacher development strategies are informed by detailed learner performance data that will pinpoint areas where the instructional process needs to change. Hallinger (2009) asserts that an effective instructional leader should develop a culture of continuous improvement. To the researcher this means that the schools need to be transformed. A transformational leader, according to Bass (1985) communicates organisation's goals, provides a sense of purpose and challenges followers with high

standards. The researcher argues that analysing the previous results is one way of challenging schools to improve in their outcomes.

Weber (1996), in his instructional leadership model contends that deliberate and on-going assessment is essential to improving school's instructional programme. What the participants did, as part of their roles as subject advisors, seemed to be aligned with this contention.

The majority of the participants however, did not mention class visits as part of their job description. It was only Mrs Glen who said:

> *I go to the classroom to observe a lesson and give some advice and ascertain if the workbooks supplied by the department are utilised.*
> (Mrs Glen)

Most participants cited that there is not enough time to attend to most schools and they mostly respond to crisis.

> *... what I normally do is prioritise those schools who phone and cry for help because I cannot go to all the schools.* (Mr Brown)

Mr Groove said:

> *I am busy running all the time attending to the crisis and the poor performing schools.*

Mr Brown's and Groove's articulations suggest to the researcher that there is no time allocated to class visits by these participants. That is why they did not mention it when asked about their roles as subject advisors. Whether they knew about it as part of their responsibility, was not clear to the researcher. This suggested that the researcher's claim, made in Chapter Two that most subject advisors confine their support to administrative duties and paper work could be true. This is in contrast with Gurr, *et. al.* (2007) who state that an instructional leader is always visible not only at school but also in class. Even the DoBE (2013) specifies that the support subject advisors should give to schools must include class visits and classroom observations. Weber (1996) also argues that instructional leaders should use classroom observations as a way of improving instructional leadership practices in their schools.

The researcher also noted with interest that all the participants, except Mr Groove, did not mention anything concerning conducting research to inform instructional leadership practices in their schools. It was only Mr Groove who was aware that he should be conducting research in order to understand teachers and learners he was leading as well as the context in which he

was operating before he could hope to effectively improve instruction. He claimed that because he attended to too many schools, all alone, that was impossible.

> *I do not have too much time for research purely because I am busy running all the time attending to the crisis and the poor performing schools. At the moment there is nothing that I do by way of serious research into looking at the quality of learner performance or learning outcomes over a period of time.* (Mr Groove)

The silence of the majority of the participants on the issue of conducting research, as part of their job description, suggested to the researcher that it was highly possible that the subject advisors did not conduct any research to make informed instructional leadership decisions. This allegation is confirmed by Mr Groove's statement above. Tan (2012) argues that instructional leaders must first conduct action research that will investigate and identify problem areas so as to make evidence-based decisions about teaching and learning. Concurring with Tan are Coburn and Talbert (2006) who also posit that instructional leadership should emphasise on action research that will create contextualised knowledge that will serve the unique nature of each particular school. This is also in line with the assertion by Spillane and Loius (2002) that without understanding the knowledge necessary for teachers to teach well, the content to be taught and specific pedagogical knowledge of learners, school leaders will be unable to support instructional improvement and teacher supporting activities. The researcher argues that one of the best sources of the knowledge that Spillane and Loius (2002) are referring to above is action research. Weber (1996) also argues that instructional leaders should conduct research and also encourage teachers to initiate their own in order to make informed decisions.

From the above data interrogation, one can deduce that, generally, subject advisors understood their instructional leadership roles as articulated by the reviewed literature and the DoBE (2013) but some other aspects of their responsibilities were neglected. Data generated during the interactions with the participants could be categorised into three. One, there are certain responsibilities that form part of their job description that they talked about and executed. Two, there are responsibilities that they knew form part of their job description but for some reason or the other they were unable to execute. Three, there are those responsibilities that they did not talk about and they did not do. It is not clear whether the responsibilities mentioned in three were known to the participants or not.

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4.2.3 Collaboration with other stakeholders

The finding here was that all the participants collaborated with other stakeholders towards the betterment of instructional leadership practices in their schools. Mr Groove said:

> *...we work with* (name of the company). *It's one of these industries in* (name of the place) *that provide tuition to our learners during weekends and holidays.* (Mr Groove)

The name of the company could not be published in this study for ethical reasons but its name was made known to the researcher. The document review revealed that this company had a programme for grade 12 learners during the winter vacation of June/July 2013. Two different centres were used for that programme. The documents also revealed that an average of about 310 learners, per day, attended that program.

Mr Lock collaborated with other stakeholders as well. This was confirmed by this articulation:

> *... I have* (name of the NGO)*. This is the project by the NGO which helps in terms of how teachers are supposed to teach in a lively way.* (Mr Lock)

An attendance register was witnessed by the researcher where fifty nine teachers were workshopped by this NGO. This workshop was held in one of the schools in the district on the 17th of May 2012. An instrument used during this workshop was also seen by the researcher.

The DoBE (2013) posits that district office personnel must exhibit the Batho Pele principles when dealing with other stakeholders. These principles involve consultation with other stakeholders as well as increasing access to services, amongst others. The participants seemed to be in line with this requirement. Gurr, *et. al.* (2007) also view an effective instructional leader as somebody who has a vision and the ability to develop a shared purpose by communicating that vision to other stakeholders. This view is also in line with Burns' (1978) argument that a transformational leader establishes a relationship of common stimulation and elevation that transforms the organisation because of the capacity of working in collaboration towards a common vision. Childress, *et. al.* (2007) also contend that stakeholders like parents, NGOs, local politicians and learners must be invited for their wisdom. The participants' utterances further concur with Weber's (1996) instructional leadership theory that views

instructional leadership practices as encompassing the whole systems that contribute to what the school is or to what it ought to be. This, Weber (1985) argues refers to all the resources available through the district or the community.

The general finding under this theme suggests that the participants were aware of the importance of involving other stakeholders in education matters and they engaged them in their instructional leadership programmes.

4.2.4 Challenges subject advisors experience when executing their duties

The findings revealed a number of challenges that prevented the participants from effectively executing their tasks. These barriers are categorised and discussed below.

4.2.4.1 Inadequate human resources

The finding here revealed the availability of inadequate human resources. The researcher noted that the school visits that the participants referred to as one of their responsibilities were not done to every school. All the participants complained about work overload that prevented them from visiting each and every school. Mr Groove said:

> *One of the biggest challenges is inadequate staff. When I say inadequate staff I mean unfilled posts.* (Mr Groove)

Mr Brown stated:

> *Two or three years may come and go without me visiting maybe about fifteen schools because there is lack of human resource.* (Mr Brown)

Mr Groove confirmed Mr Brown's assertion by stating:

> *… so to actually go to every school and intervene right where teaching and learning happens is not always possible because you cannot get around 160 schools in a district with only one advisor.* (Mr Groove)

To corroborate what Mr Groove articulated, the document reviewed (the learner support programme arranged for June/July 2013 vacation) that was initially intended for 21 schools, only reached 15 of its intended schools. Mr Groove attributed that to a shortage of human resources.

The above finding is in line with Jansen's (2002) argument that there are so many policies aimed at transforming the South African education system but there is very little change taking place in the classroom. He refers to this as *political symbolism* where policy

formulation does not translate to proper implementation. Although there is a policy on the organisation and staffing of education district offices and delegated authority, roles and responsibilities, the "service delivery by many district offices, especially with respect to the vital function of curriculum support, … falls far short of what education institutions and the public expect" (DoBE, 2013, p.8).

What the participants said suggested that there are schools, in KwaZulu-Natal, that did not get the support from the subject advisors for some time. Mafora and Phorabatho (2013) found that some schools, in the Eastern Cape and KwaZulu-Natal, have difficulty in managing and implementing the NCS. The researcher asserts that this can have a negative impact on the academic performance of the learners in these provinces. Robinson, *et. al.* (2008) state that educational leaders should get closer to the core business of teaching and learning in order to have a positive impact on learners' outcomes. Weber (1996) in his model of instructional leadership posits that an instructional leader must be capable of supervising and evaluating instruction, coordinating the curriculum and monitoring learners' progress. The researcher argues that for all of these activities to be effective, an instructional leader must work very closely with all the schools under his/her jurisdiction. Unfortunately, from the above finding, this does not happen in some schools.

4.2.4.2 Inadequate material resources

Another finding was the lack of adequate material resources. This problem was experienced both at the district and at the school levels. When referring to this problem, Mrs Glen said:

> *We don't have departmental computers… so you have to make a plan for yourself to work for the department.* (Mrs Glen)

Supporting this statement was Mr Brown:

> *…there is a shortage of KZN vehicles. I would spend a week without a car and that means not visiting any school. Also I have no computer and no internet. That's the problem that I have otherwise I have to use my own computer.* (Mr Brown)

Childress *et. al.* (2007) argue that district leaders must allocate resources in a way that is coherent with the education district strategy. The researcher argues that effective instructional leadership practices, as envisaged by the DoBE (2013), cannot be achieved in an environment that has no of fewer resources. Sykes, *et. al.* (2009) argue that there is evidence that education

districts can have a positive effect on matters of teaching, curriculum and assessment but the failure of school reforms can be laid squarely at the feet of these administrative offices.

The DoBE (2013) asserts that one of the responsibilities of the subject advisors, as education district personnel, is to facilitate Information and Communications Technology (ICT) connectivity in all education institutions within the district. The articulations by Mr Brown and Mrs Glen alluding to the unavailability of computers and internet in their district office, suggest that communication and sharing of information between schools and the district were problematic. In this 21st century, where the digital communication technology makes sharing of information more easy and enjoyable, especially to the learners, one would expect the education district personnel to use ICT to their advantage. The researcher asserts that the comments above, that even the district office under scrutiny in this study, did not have computers and internet, suggest that learners from the schools this district was serving, were deprived of some information as compared to their counterparts from other parts of the world.

The shortage of the material resources also affected the schools as well. Mr Lock said:

> *… the learners do not have books and they have to photocopy. Sometimes they use previously used textbooks which are out-dated*. (Mr Lock)

Mrs Glen said:

> *… there is also a challenge with the CAPS documents because the national department gave us few. It's only those schools that are resourceful that have managed to make themselves copies.* (Mrs Glen)

According to Weber (1996) an effective instructional leader must promote a positive school learning climate. The researcher argues that one way of doing that is providing adequate resources to the schools. The researcher is aware that providing resources to schools is the direct responsibility of the District Curriculum Support Team (DoBE, 2013) but subject advisors, as curriculum managers and leaders, are part of this formation. By providing adequate resources, subject advisors as transformational leaders can increase the commitment of the staff and their belief in schools and that in turn can yield better performance (Bass, 1985).

4.2.4.3 Teachers' incapacity

The finding from the participants' articulations suggests that there were problems brought about by the School Management Teams (SMTs) and the teachers in schools. First, there

were principals who did not understand what was going on in the curriculum. Mrs Glen articulated:

> *… you find that the principals know about CAPS but have no knowledge of what is going on in any subject instead they will push you to the Head of Department (HoD) yet they are the managers in the schools.* (Mrs Glen)

Second, the SMTs that did not monitor teachers' work. Mr Brown said:

> *… so in most cases the problem is that the SMTs don't monitor the educators' work.* (Mr Brown)

Concurring with Mr Brown was Mrs Glen who said:

> *The relations are not good because people do not want to be managed and the HoDs will withdraw and don't monitor any teachers' work.* (Mrs Glen)

The DoBE (2013) argues that advising and consulting with the school principals on curriculum matters is the responsibility of the subject advisors. According to Weber (1996) one of the critical areas requiring attention in instructional leadership is providing in-service training and informed advice for the improvement of instructional programmes.

Another finding from the participants' comments was the teachers' lack of content knowledge. Mr Lock said:

> *I think we need more content workshops. There are certain aspects that are giving learners some problems and even some educators.* (Mr Lock)

Sharing the same sentiment was Mrs Glen in her statement:

> *… ANA results have shown us that most of the teachers are not teaching that concept correctly.* (Mrs Glen)

The above articulations suggest what Bantwini and King-Mckenzie (2011) articulated when saying that most South African teachers do not receive effective teacher education and therefore have challenges when coming to the content of their respective subjects. This finding is also consistent with Pansiri's (2008) finding in Botswana about teachers' inadequate training and their inability to provide effective instructional leadership. The subject advisors, as instructional leaders, must "monitor the quality of the instruction in school, check for consistency in standards, and be available to help solve (or point out) the behavioural or academic problems that every teacher encounters" (Weber, 1996, p.271).

The next finding was the teachers' negative attitude towards their work and towards the management. Mr Lock's articulation was:

> *The experienced educators think they have been teaching for a long time*
> *and now they know everything.* (Mr Lock)

Mr Brown also had a similar experience to share.

> *When I go to a school some educators have an attitude and I tell them that*
> *I am not a policeman but am there to guide and support them.* (Mr Brown)

Mrs Glen:

> *It is just this lack of morale and the 'I don't care' attitude that I have*
> *picked up.* (Mrs Glen)

This finding is consistent with Otunga, *et. al.* (2008) when asserting that communication breakdown and demotivated teachers are some of the challenges that subject advisors as instructional leaders have to contend with. Some teachers view instructional supervision as a witch-hunting exercise (Moswela, 2010; Wanzare, 2012). Weber (1996) argues that the most essential factor that affects students' learning is "the set of beliefs, values, and attitudes that administrators, teachers, and students hold about learning" (p. 263). Weber further asserts that an instructional leader creates a learning climate that encourages teachers to go beyond the minimum and actively affirms the values that they seek to convey to learners. The participants' articulations above suggest that the SMTs were not capacitated to execute their responsibility of ensuring effective instructional improvement at the school level. The teachers were also not contributing to effective instructional improvement in their schools.

4.2.4.4 Poor communication

There were two different findings under this theme. First, some teacher unions determine when and how educational programmes were to be implemented at the district level. Mrs Glen said:

> *I can't really say that who at the national level gave them* (union
> officials) *the mandate to run workshop excluding me as the subject*
> *advisor because some of the information in some of these workshops was*
> *distorted and the teachers were complaining.* (Mrs Glen)

Mr Brown also had this to say:

> *As we speak we have not trained educators. In June we started and were*
> *stopped by the union. We'll train them in October and November which*

> *is very awkward because exams will be starting. We also have the 'Work*
> *to Rule' which has disturbed us twice this year.* (Mr Brown)

Mrs Glen complained about not being consulted, as a subject advisor, when teachers under her supervision were workshopped by a particular teacher union. Another interesting point, the researcher argues is worth mentioning, are the attitudes that can be identified from this comment:

> *... they came to me and said they want to introduce themselves as the*
> *new elected committee for* (name of the union), *the big union and I said*
> *fine.* (Mrs Glen)

This utterance, the researcher contends, displays power on the part of the union and a certain degree of helplessness from Mrs Glen.

Another finding from the utterances of the other two participants was that they did not experience challenges from the union activities. When asked whether they experienced any barriers from teacher unions, one participant said no. The other went on went on to say:

> *I do not have serious issues with the unions. If at all issues arise, it is*
> *because of the matter between the head office and the unions, for*
> *example the recent abandoning of the CAPS programs. That had nothing*
> *to do with the advisors.* (Mr Groove)

The researcher finds this comment contradictory in the sense that all the participants complained about huge workloads and less time to execute their duties. Surely, anything hindering progress in their itineraries, like being "*stopped*" when conducting workshops, would raise a serious concern for them. As an education departmental employee, the researcher argues that teacher unions are the most powerful stakeholders in the South African education sector. The utterances from the last two participants, the researcher asserts, could be reflective of persons not wanting to be seen tarnishing the unions' names especially that some departmental officials were loyal to some unions. The researcher's argument can be confirmed by the following comment from Mrs Glen:

> *I was only instructed to book venues if the union phoned me.* (Mrs Glen)

Mrs Glen was referring to the venues where the workshops, that she complained about earlier, were going to be conducted. From this comment, surely somebody at the higher level of the departmental organogram condoned the bypassing of the subject advisor in planning workshops for teachers under the supervision of the very same subject advisor who, from the researcher's point of view, was relegated to securing the venue.

The researcher's experience is that teacher unions influence education policies through collective bargaining in the Education Labour Relations Council (ELRC). This is done at the national level but they also influence decisions taken at the provincial and the district levels. The comments by some of the participants suggest that some teacher unions do not sometimes consult with subject advisors on matters concerning their subjects and responsibilities. This defeats Burns' (1978) vision of transformational leadership that should develop the capacity of working in collaboration with other stakeholders towards a common vision. It further contradicts Weber's (1996) idea of a shared leadership by all the stakeholders that will enhance learning.

4.2.5 Subject advisors' way of navigating their challenges

4.2.5.1 Navigating challenges from lack of human resources

The findings suggest that inadequate human resources challenges subject advisors in executing instructional leadership practices in their schools. As a consequence of this, they are not able to fulfil their responsibilities of visiting and supporting all the schools as required by their job description. In order to reach all the schools, they organise workshops and invite all the schools to these. They also form clusters where schools meet as a group and discuss anything concerning teaching and learning. Mr Lock said:

> *… I usually hold these workshops at the beginning of the year and I lay out things that educators are supposed to do, how they are supposed to teach and how to tackle challenges in the subject.* (Mr Lock)

Mr Brown also had this to say:

> *I organise schools into clusters and visit a particular cluster, of maybe ten schools, at a certain school to be able to assist them there because there is a shortage of staff.* (Mr Brown)

The Department of Basic Education (2013) defines the subject advisor as a specialist office-based educator whose main function is to "facilitate curriculum implementation and improve the environment and process of learning and teaching by visiting schools, consulting with and advising school principals and teachers on curriculum matters" (p.11). This is in contrast with what these participants referred to above. From their articulations, some schools were not visited at all. This could be the reason why some teachers blame the subject advisors for being "out of touch with what was happening in schools" (Daniels & Strauss, 2010, p.1389).

Mrs Glen said:

> *… you know sometimes in a month I end up not visiting any school*
> *because my itinerary is full of workshops so some schools would phone if*
> *they have a problem.* (Mrs Glen)

This comment by Mrs Glen suggests that some schools in the district where this study was conducted did not get instructional support from the subject advisor because they did not did not have technological advancements like telephones and internet. A similar comment also came from Mr Brown:

> *… what I normally do is prioritise those schools who phone and cry for*
> *help because I cannot go to all the schools.* (Mr Brown)

The researcher argues that the above assertions by the two participants raise serious concerns, for if instructional leadership programmes are to be effective, they must be closely monitored and supported by instructional leaders (Coburn & Talbert, 2006; Childress, *et. al*., 2007; Tan, 2012). Bush, *et. al.* (2009) support this contention by positing that improved learner outcomes can only be realised if educational leaders and managers are directly involved in the core business of teaching and learning. The researcher's contention is that, from the above inferences, this was clearly not happening in some schools.

Another concern by the researcher, as an experienced teacher himself, is that school principals do not attend these workshops and cluster meetings, only subject teachers do. The implication thereof is that the principals, who monitor curriculum implementation in their schools, are left behind. An articulation by Mrs Glen that principals do not know anything about the curriculum implementation in their schools confirms this. Christie (2006) and Hoadley and Ward (2009) argue that school principals are poorly prepared for their responsibilities as instructional leaders and managers. Mafora and Phorabatho (2013) also found that some school principals do not get support from the subject advisors concerning curriculum implementation.

The researcher also posits that the uniqueness of each school is not considered in these workshops and cluster meetings. The opportunity of looking into the contextual factors of each school is lost. Hallinger (2009) argues that schools differ widely in terms of their needs and resources and advises instructional leaders to take into cognisance the uniqueness of a particular context when executing their responsibilities.

According to Mr Lock, another activity taking place in the cluster meetings is the monitoring of the teachers' as well as the learners' work. The researcher's experience in this regard was that monitoring of work was done amongst teachers themselves. Mr Lock confirmed this with this statement:

> *...we come as a district and we check the work amongst ourselves. Teachers check and I take samples to check what the educators have done.*
>
> (Mr Lock)

Teachers in the Western Cape (Daniels & Strauss, 2010) complain about the subject advisors shifting their responsibility and workload to them. These teachers claim that some subject advisors leave the evaluation of the learners' work to them. They claim that when moderation is taking place, schools exchange learners' books and assess each other's work. The researcher is concerned about the capacity of the teachers in dealing with this situation. If a study conducted by Bantwini and King-Mckenzie (2011) concluded that most South African teachers are not adequately equipped to execute their responsibilities, it leaves the researcher wondering if these teachers do justice in evaluating their own and their learners' work. Mr Lock '*took samples*' to ensure the success of moderation sessions but the researcher argues that that was not enough as it did not guarantee that justice is done to all the schools whose work was moderated. The researcher further contends, from experience, that cluster moderations only become serious at grade 12 level. If instructional support is only administered through clusters, it means that the majority of the learners who are not doing grade 12 will not be adequately supported.

Weber (1996) advocates for an instructional leader who monitors the quality of the instruction in schools and assists in solving academic or behavioural problems in the classrooms. The researcher argues that improvising for school and classroom visits, in the manner mentioned above, does not entirely fulfil the purpose of rendering effective support to schools as it does not guarantee the quality of improved instructional practices in the classrooms.

4.2.5.2 Navigating challenges from lack of material resources

As mentioned earlier, another finding pointed to the lack of material resources. The participants claimed that they improvised by using their own resources. This then suggests that the department could not support the subject advisors in fulfilling their roles as instructional leaders. Mr Brown in one instance said:

> *...if you do not have a car you can't do anything unless you have somebody to go with in his car.* (Mr Brown)

This statement suggests that if a subject advisor did not have a car, he or she could not visit a school of his or her choice but that of his partner who had a car even if there were more desperate schools out there.

On the issue of school books and notes, schools were encouraged to do copies for themselves. Mr Lock said:

> *... learners do not have books and they have to photocopy.* (Mr Lock)

Mrs Glen also said:

> *It's only those schools that are resourceful that have managed to make copies of the CAPS documents.* (Mrs Glen)

One of the roles of the subject advisors, as the education district officers, is to assist schools with the compilation of improvement plans that will be integrated into the district programmes (DoBE, 2013). The researcher asserts that the success of the development plans, both at the district and at the school levels, is dependent on the availability of the resources. Childress *et. al.* (2007) contend that more resources must be directed to the district strategy to make the instructional core more powerful and effective.

Some learners come from poor financial backgrounds. The government introduced the exemption from payment of school fees in order to assist parents to access quality education for their children, irrespective of their background or financial constraints. To expect learners, from this poor background, to do their own copies from books would be inappropriate. Schools also differ in their financial status. Some are resourceful as indicated above but others are not. From Mrs Glen's comment, it is suggested that some teachers, who are supposed to implement CAPS do not have the documents essential to assist them in that regard because their schools do not have the means to make copies for themselves. That is why Mrs Glen later said:

> *... you can see in the workshop that these people are opening the policy document for the first time with you.* (Mrs Glen)

This latter comment by Mrs Glen concurs with scholars (Christie, 2006; Hoadley & Ward, 2009) who argue that South African teachers are not adequately equipped to provide effective instructional leadership. A similar conclusion comes from Pansiri (2008) about teachers that are inadequately trained and cannot provide effective instructional leadership in Botswana.

Teachers that do not have policy documents cannot be expected to implement the contents of that policy. Weber (1996) asserts that an instructional leader must provide resources in line with the school's mission. From the above scenario this was not happening. The researcher asserts that it seems as if the participants, in this study, were unable to conquer the war against the unavailability of the resources and that implied that instructional improvement in some schools was likely not to be realised.

4.2.5.3 Navigating challenges from teachers' incapacity

The participants complained about either teachers not being capacitated to execute their tasks or not willing to. First, the challenge was about the principals who did not have the ability to effectively implement the curriculum in their schools. Some participants said this about supporting the SMT:

> *We do have management workshops where we give them a global idea of what is going on in CAPS but it is too generic as compared to workshopping somebody who is in the classroom.* (Mrs Glen)

Mr Brown said:

> *That is why we train the SMTs before we can implement CAPS.*
> (Mr Brown)

The researcher's experience as a teacher is that most school principals do not have subject knowledge of all that is taught in their schools. Although they were once subject teachers, others usually stop teaching on resuming positions of being principals, citing overload of management activities and as a result also stop attending subject workshops. Mrs Glen suggests that it would be better if school principals had a sound knowledge of subjects offered in their schools. Hallinger contends that an instructional leader must also have expertise in teaching and learning. This, the researcher posits, cannot be achieved if instructional leaders are distant from the classrooms and their activities. Being in class can empower school principals about the recent developments in the curriculum which in turn can help them as curriculum implementers in supporting their teachers.

The above articulation by Mrs Glen further suggests that very little is done to advise and support school principals as curriculum implementers in their schools. Her earlier articulation about these principals' lack of knowledge about CAPS bears testimony to this. The Department of Basic Education (2013) clearly states that the function of the subject advisors is to visit schools and advise school principals on curriculum matters but clearly this is not

happening at the level required for it to be effective. This claim is consistent with conclusions reached by certain scholars (Niane, 2003; De Grauwe, *et. al*., 2005; Pansiri, 2008) that, generally, African schools do not get the necessary instructional support and supervision from the education district personnel.

Participants also raise concerns about teachers who do no contribute effectively in instructional improvement. From the utterances quoted above some teachers are not adequately trained and others are not willing to cooperate with the departmental officials. In order to assist those who lack the ability to execute their work effectively, all the participants organised workshops, cluster meetings and visit their schools. This is supported by these utterances by Mr Lock:

> *I support educators by having orientation workshops to tell them about*
> *what is expected of them for the current year.* (Mr Lock)

Mr Groove:

> *I conduct what I call orientation workshops… and thereafter I start with*
> *school visits.* (Mr Groove)

The researcher's experience about these workshops is that they deal more with administrative issues rather than teaching and learning. Less is said about the content of the subjects. Administrative matters ensure that teachers are up to date with their tasks as specified in their work programmes and also that they keep records of their work, just to mention a few. One of the participants, Mr Lock, shared a similar sentiment with the researcher when saying:

> *I think we need more content workshops.* (Mr Lock)

Another concern from the researcher is that these workshops address schools and teachers as if they were similar disregarding their unique nature and as a result do not assist teachers in dealing with the unique curriculum challenges in their schools. Mr Brown said:

> *I organise schools into clusters and visit a particular cluster, of maybe ten*
> *schools….* (Mr Brown)

Concurring was Mr Groove:

> *…I don't have a set program designed for a particular school because*
> *they are unique in terms of the learning outcomes that we expect.*
> (Mr Groove)

Subject advisors are transformational leaders and Bass (1985) describes a transformational leader as a leader who gives personal attention to individual members of the organisation.

For those teachers who do not want to co-operate Mr Groove said:

> *... so there are issues with the teachers who do not attend regularly, whose work is incomplete. That problem the advisor cannot solve. That problem the advisor refers to the principal or to the circuit manager.*
> (Mr Groove)

Mrs Glen said that she does the following:

> *... it's a matter of trying to edge and plead, you know, because there is nothing really I can do to a person who is employed to teach but does not.*
> (Mrs Glen)

Daniels and Strauss (2010) argue that the work context, within which teachers function, should be transformed into an environment that allows for effective instructional leadership. Weber's (1996) model of instructional leadership posits for an instructional leader that devotes energy to creating a climate in which people's defensiveness is recognised and diffused.

All the participants had similar responses on the matter of the teachers who had management problems. The above articulations by Mr Groove and Mrs Brown suggest that the participants were powerless when coming to disciplining teachers who find it hard to do their duties. In a situation like this, strong leadership and support by subject advisors is essential.

4.2.5.4 Navigating challenges from poor communication

The finding suggests that teacher unions influenced educational programmes in one way or the other. Sometimes they took decisions for the ED. This is confirmed by the following utterances:

> *We were stopped. They should have come to us and told us not to plan. We planned, had the material printed and all that was wasted.* (Mr Brown)

Mrs Glen says:

> *I was only instructed to book the venue if the teacher union phoned me. The rest of the logistics were not mine.* (Mrs Glen)

These two utterances suggest that the subject advisors, in the district in which this study was conducted, were powerless and were not consulted when it came to teacher unions making decisions affecting educational matters within their sphere of leadership. This was confirmed by this statement by Mrs Glen:

> *Who was facilitating, I did not have an idea. I had no influence at all.* (Mrs Glen)

Mr Groove said:

> *... we don't deal directly with the unions as subject advisors. We only*
> *work with the unions when there is an agreement between the province or*
> *the district and them on certain programmes.* (Mr Groove)

From the above participants' articulations, it is clear that the unions consulted with higher departmental officials to take decisions that affect district programmes without subject advisors taking part in those decision making structures. The researcher also argues that it is evidently clear that some district programmes were interrupted if the unions felt it necessary and these had to be rescheduled. Our education districts need restructuring of the decision making lines of authority to include more of those professionals who actually carry out and implement the curriculum policies (Weber, 1996). The researcher's view is that the district, where this study was conducted, seemed powerless in the face of some teacher unions. The researcher believes that subject advisors and teacher unions should be collaborating in ensuring instructional improvement in schools.

4.3 Chapter summary

The discussion about the research findings in this chapter was influenced by the key research questions raised in Chapter One and the literature reviewed together with the theoretical frameworks adopted in Chapter Two. The findings were categorised into themes identified and guided by the research questions. The study looked at how the participants viewed their roles as instructional leaders. While describing their roles, the participants also touched on the tasks they engaged in towards instructional improvement in their schools. This project also focused on what the participants do to collaborate with other stakeholders. The study further analysed the challenges, from different stakeholders, that the participants encountered while engaged in instructional leadership practices. This chapter also scrutinised what the participants articulate as a way of navigating these challenges. The next chapter will summarise the entire research project by drawing conclusions from the findings and making recommendations informed by these conclusions.

CHAPTER FIVE
SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

5.1 Introduction

The preceding chapter focused on the presentation of data generated through semi-structured interviews and documents reviews. This data was critiqued through the lens of the literature reviewed and the theoretical frameworks adopted earlier in this research project. While analysing data, certain findings were reached from responses to key research questions. This chapter then presents the study summary, the conclusions and recommendations of the entire study. A chapter summary concludes the presentation.

5.2 Summary of the study

Chapter One gave an overall view of this research project. It outlined the background leading to the investigation of the role of the subject advisors in supporting instructional leadership practices in schools. The purpose and the rationale for undertaking this study were justified. Key research questions were stated followed by the clarification of the key terms used in the study. A brief summary of the literature reviewed and the theoretical frameworks underpinning the research project were outlined. The research design and the methodology to be employed throughout the study were also clarified and this was followed by a summary of the foreseen limitations of the study as well as the ways of mitigating those limitations.

Chapter Two reviewed and analysed scholastic literature on the instructional leadership practices in schools. Views from the international, continental as well as the national scholars about the research topic were interrogated. Theoretical frameworks perceived as relevant to this research project were adopted and also interrogated.

Chapter Three expatiated on the research design and methodology to underpin the study. The research project was located within a particular research paradigm in line with the research design and methodology identified for the study. Following was the identification of the samples with the data generation instruments to be utilised as well as the justification for using those instruments. Data analysis method to be used was identified and also justified before looking into other pertinent issues like the trustworthiness of the study, ethical issues to be observed as well as factors perceived to be limiting to the study.

Chapter Four presented data generated through semi-structured interviews and documents reviews. Reviewed literature and adopted theoretical frameworks assisted in analysing and interrogating the findings derived from critiquing the data from the participants. This analysis was also guided by the key research questions. Emergent themes were identified from the data generated and certain conclusions were drawn.

Chapter Five gives the bird's eye view of the reflection of the overall research study. Conclusions are drawn from the findings in Chapter Four. These conclusions inform recommendations thought to be pertinent to this research project.

5.3 Conclusions

The aim of this project was to explore the role of subject advisors in supporting instructional leadership practices in schools. This aim informed key research questions which were addressed through interrogating literature and interacting with the subject advisors and some documented records at a district being the case. From the above interaction certain conclusions were reached and are discussed below.

Regarding the biographical data analysis of the participants, it was clear that the qualifications and the cumulative experiences of the subject advisors were vast but did not guarantee successful instructional support to schools. Certain factors were also indispensable for them to carry out their mandated responsibilities effectively. Those factors included the availability of the resources, the number of schools supported by each subject advisor, the degree of collaboration with other stakeholders and the capabilities and the attitudes of the teachers. These and other factors appeared to impinge on the subject advisors ability to carry out their work successfully.

The researcher also found that the subject advisors, in the case studied, understood their roles and responsibilities to be that of supporting and implementing the curriculum but certain areas were neglected. No research was conducted by the subject advisors to inform their practices. From the above finding, it can be concluded that the instructional improvement programmes implemented were hardly based on informed evidence and were general in nature in the sense that the individual character of the schools was not considered.

Another interesting point established was that the data interrogated did not reveal any in-service training for the subject advisors. One of the participants was a Chief Education Specialist and the other two were Deputy Chief Education Specialists but no in-service training was mentioned for the subject advisors under their supervision to equip them with skills relevant to their responsibilities. The conclusion here can be that the lack of in-service training and the related activities have a negative effect on how subject advisors carry out their tasks.

Subject advisors were stretched beyond their capabilities. There was a shortage of subject advisors resulting in some schools not getting the support they deserve. Class visits were not getting enough attention. Only one participant mentioned class visits as part of the subject advisors' responsibility. There was also limited availability of the resources like departmental cars, computers and the internet. Subject advisors would sometimes improvise by providing their own resources. This leads the researcher to conclude that subject advisors' workloads as well as limited availability of the resources were impinging on their ability to service the schools under their care effectively.

It was also noted that certain teachers were not capable of executing their duties. What made things worse was the fact that some school principals did not get adequate support to assist them in the implementation and the monitoring of the curriculum in their schools. Another point was that when visiting schools, subject advisors sometimes did not get co-operation especially from the veteran teachers. Interrogated data revealed that these subject advisors did not have an immediate remedy for such behaviour. They were dependent on long and tedious processes to address such problems. As a result they resorted to pleading with the teachers who proved to be difficult in dealing with. The researcher concludes that subject advisors were not capable of dealing with problematic teachers.

With regard to collaborating with other stakeholders, the finding was that subject advisors collaborated with certain stakeholders but there was disharmony when coming to teacher unions. Certain departmental officials, higher up in the hierarchy, would liaise with teacher unions and thereafter instruct the subject advisors to implement decisions that they were not part of, but that fall within their job descriptions. Teacher unions would organise and implement programmes thought to be aimed at instructional improvement at schools without consulting the subject advisors. Subject advisors would get instruction from higher

departmental officials that they should support the teacher unions, but such support would not invite their input. Sometimes programmes designed and implemented by the subject advisors would be disrupted or halted if the teacher unions deemed they should do so. The conclusion arrived at here was that the DoBE was becoming powerless in the hands of some teacher unions.

5.4 Recommendations

Based on the findings in Chapter Four and the conclusions above, the following recommendations are made:

5.4.1 Proper implementation of Notice 300 of 2013

In March 2013 the DoBE (2013) released the Policy on the Organisation, Roles and the Responsibilities of Education Districts (Notice 300 of 2013). This policy provides "a national framework for the organisation and the staffing of education district offices and the delegated authority, roles and responsibilities of district officials for the institutions within their care" (DoBE, 2013, p.4). The researcher is of the view that proper implementation of this policy together with *Action Plan to 2014 – Towards the Realisation of Schooling 2025* (DoBE, 2011) and monitoring thereof would eliminate most of the barriers faced by subject advisors in supporting instructional improvement in schools. The above referred to Action Plan stipulates steps to be implemented and the time frames thereof that will see the improvement of basic education up to the year 2025.

5.4.2 In-service training of the subject advisors

Research-based practices are crucial in improving school curriculum and instruction. There is an unprecedented demand placed on the school districts to use evidence in guiding their instructional improvement efforts. In-service training programmes can assist subject advisors in professional development as well as in acquiring research skills that will provide them with a wide range of evidence to inform their instructional improvement programmes.

5.4.3 Appointment of more subject advisors

The DoBE needs to secure the services of more subject advisors and each one of them to be responsible for a reasonable number of schools. Data interrogation in this study revealed that each subject advisor was responsible for more than 120 schools and an ideal situation,

suggests the researcher, would be ± 30 schools per subject advisor. This would allow more time for the subject advisor to spend in each school and also improve the quantity and quality of instructional support each school receives.

5.4.4 Provision of material resources

A collaborative district budget planning is crucial in allocating resources essential for instructional improvement. The provisioning of state cars, computers and ICT is essential in ensuring proper service delivery and communication between subject advisors and schools. Material resources must also be made available to schools. Learner and Teacher Support Materials (LTSM) like subject policies and books must be abundantly available.

5.4.5 Training of the SMTs and other teachers

Subject advisors can use training as an important tool to help school leaders and teachers in instructional improvement. School principals and the HoDs are the curriculum implementers and monitors at the school level. Vigorous training is essential in ensuring that the SMTs are well equipped to support teachers under their supervision. In the South African context, the education system is ever-changing therefore there is a great need for training to be continuous. The researcher is also of the view that the training given to teachers is inadequate. More time needs to be spent on the content of their respective subjects. If teachers have a problem with the content of what they teach, surely there will be even more problems for leaners.

5.4.6 Clear delegated authority

Teachers' incapacity and uncooperativeness must be dealt with promptly but through proper channels and agreed upon procedures. The uncertainty on clear delegated authority in this regard results in tedious and bureaucratic delays when such teachers are taken to task and that impedes service delivery. This also renders subject advisors helpless in the face of those teachers who are incapable and those who do not want to cooperate towards the improvement of instruction in their schools.

5.4.7 Involvement of subject advisors in decision making structures

The DoBE should regain control of the education department from the teacher unions by cleansing itself from undemocratic and negative practices. Zengele (2013) states that it seems

as if the teacher unions have taken over the South African education system and if the DoBE is serious about being the reputable provider of basic education to all children, it needs to take back the controlling power from these unions. The core business of the DoBE is to improve teaching and learning activities in schools and that should be the main focus. The researcher is of the opinion that, that cannot be achieved if subject advisors are left outside decision making structures especially if those decisions touch on instructional improvement programmes. The nature of their work demands that any programme designed for teaching and learning at their level be blessed with their input.

5.5 Implications of the study

This case study explored subject advisors in supporting instructional leadership practices in schools. It must be noted that the case was only one education district in KwaZulu-Natal and the very nature of a case study limits generalising the findings to other districts, however, the findings provide an insight of the general nature of subject advisors' responsibilities and the challenges thereof. There is a need for a larger scale research on this topic in order to get better insights into what subject advisors do to support teaching and learning, as well as the challenges they experience. The researcher is of the view that more research would assist both the subject advisors and curriculum policy formulators to be better equipped for instructional improvement programmes.

5.6 Chapter summary

This chapter reflected on the summary of the entire research study with the aim of establishing coherence of how the study progressed from the key research questions, literature reviewed, theoretical frameworks, methodologies and the findings. The findings were informed by data generated from the participants. These findings led to conclusions that elicited corresponding recommendations. In closing, the implications of the study were discussed.

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LIST OF APPENDICES

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PERMISSION LETTER TO THE KZN DEPARTMENT OF BASIC EDUCATION

P.O. Box 1612

Pinetown

3600

30 July 2013

The Superintendent-General

Department of Basic Education

Province of KwaZulu-Natal

Private Bag X9137

Pietermaritzburg

3201

Dear Sir/Madam

REQUEST FOR PERMISSION TO CONDUCT RESEARCH

My name is Jeffrey Shozi, a Masters student at the University of KwaZulu-Natal (Edgewood Campus). As part of my degree fulfilment, I am required to conduct a research. I therefore kindly seek permission to conduct a research in ▮▮▮▮▮▮▮▮. The title of my study is: **The role of subject advisors in supporting instructional leadership practices in schools: the case of one education district in KwaZulu-Natal.**

This study aims to explore the experiences of subject advisors in promoting instructional leadership practices in schools. The planned study will focus on four subject advisors in the district. The study will use semi-structured interviews and documents review. One interview will be held with each of the participants and will last for approximately 45 minutes. The interviews will be audio-recorded and transcribed.

Responses will be treated with confidentiality and pseudonyms will be used instead of the actual names. Participants will be contacted well in advance for interviews, and they will be

purposively selected to participate in this study. Participation will always remain voluntary which means that participants may withdraw from the study for any reason, anytime if they so wish without incurring any penalties.

For further information on this research project, please feel free to contact my supervisor, Mr Mthiyane at 031 260 1870/ 073 377 4672. E-mail: Mthiyanes@ukzn.ac.za. In addition, should you have any queries please feel free to contact me directly using the following contact details: Jeffrey Shozi at 031 791 2239/ 073 245 8635. E-mail: jeffsho@webmail.co.za.

Research tools are attached herewith for your perusal. Your positive response in this regard will be highly appreciated.

Thanking you in advance.

Yours sincerely

Shozi Jeffrey (Mr)

APPENDIX B

PERMISSION LETTER FROM KZN DEPARTMENT OF BASIC EDUCATION

education

Department:
Education
PROVINCE OF KWAZULU-NATAL

Enquiries: Sibusiso Alwar   Tel. 033 341 8610   Ref.:2/4/8/482

Mr Jeffrey Shozi
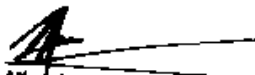P.O. Box 1612
Pinetown
3600

Dear Mr Shozi

PERMISSION TO CONDUCT RESEARCH IN THE KZN DoE INSTITUTIONS

Your application to conduct a pilot and research entitled: **THE ROLE OF SUBJECT ADVISORS IN SUPPORTING INSTRUCTIONAL LEADERSHIP IN SCHOOLS : THE CASE OF ONE EDUCATION DISTRICT IN KWAZULU-NATAL**, in the KwaZulu-Natal Department of Education Institutions has been approved. The conditions of the approval are as follows:

1. The researcher will make all the arrangements concerning the research and interviews.
2. The researcher must ensure that Educator and learning programmes are not interrupted.
3. Interviews are not conducted during the time of writing examinations in schools.
4. Learners, Educators, Schools and Institutions are not identifiable in any way from the results of the research.
5. A copy of this letter is submitted to District Managers, Principals and Heads of Institutions where the intended research and interviews are to be conducted.
6. The period of investigation is limited to the period from 01 August 2013 to 31 August 2015.
7. Your research and interviews will be limited to the schools you have proposed and approved by the Head of Department. Please note that Principals, Educators, Departmental Officials and Learners are under no obligation to participate or assist you in your investigation.
8. Should you wish to extend the period of your survey at the school(s), please contact Mr. Alwar at the contact numbers below.
9. Upon completion of the research, a brief summary of the findings, recommendations or a full report / dissertation / thesis must be submitted to the research office of the Department. Please address it to The Director-Resources Planning, Private Bag X9137, Pietermaritzburg, 3200.
10. Please note that your research and interviews will be limited to the following school/s and/or institution/s in the KwaZulu Natal Department of Education.

Pinetown District

Nkosinathi S.P. Sishi, PhD
Head of Department: Education
16 August 2013

...dedicated to service and performance
beyond the call of duty

KWAZULU-NATAL DEPARTMENT OF EDUCATION

COURTESY LETTER TO THE DISTRICT DIRECTOR

P.O. Box 1612

Pinetown

3600

30 July 2013

The District Director

████████████

██████████████████

██████

██████████

██████

Dear Sir/Madam

PERMISSION TO CONDUCT RESEARCH

My name is Jeffrey Shozi, a Masters student at the University of KwaZulu-Natal (Edgewood Campus). As part of my degree fulfilment, I am required to conduct a research as part of my degree fulfilment. Please be informed that I have sought the necessary permission in advance from the KwaZulu-Natal Department of Basic Education and has been granted the approval (See attached copy). The title of my study is: **The role of subject advisors in supporting instructional leadership practices in schools: the case of one education district in KwaZulu-Natal.**

This study aims at exploring the experiences of subject advisors in promoting instructional leadership practices in schools. The planned study will focus on four subject advisors in your district. The study will use semi-structured interviews and documents review. One interview will be held with each of the participants and will last for approximately 45 minutes. The interviews will be audio-recorded and transcribed.

Responses will be treated with confidentiality and pseudonyms will be used instead of the actual names. Participants will be contacted well in advance for interviews, and they will be purposively selected to participate in this study. Participation will always remain voluntary which means that participants may withdraw from the study for any reason, anytime if they so wish without incurring any penalties.

For further information on this research project, please feel free to contact my supervisor, Mr Mthiyane at 031 260 1870/ 073 377 4672. E-mail: Mthiyanes@ukzn.ac.za. In addition, should you have any queries please feel free to contact me directly using the following contact details: Jeffrey Shozi at 031 791 2239 / 073 245 8635. E-mail: jeffsho@webmail.co.za.

Thanking you in advance.

Yours sincerely

Shozi Jeffrey (Mr)

PERMISSION LETTER TO THE SUBJECT ADVISOR

P.O. Box 1612

Pinetown

3600

2 August 2013

The Subject Advisor (English FAL- FET Band)

█████████████

█████████████████

███████

███████████

████████

Dear Sir/Madam

REQUEST FOR PERMISSION TO CONDUCT RESEARCH

My name is Jeffrey Shozi, a Masters student at the University of KwaZulu-Natal (Edgewood Campus). I am required to conduct a research as part of my degree fulfilment. I kindly request your permission to take part in my research as a participant. The title of my study is: **The role of subject advisors in supporting instructional leadership practices in schools: the case of one education district in KwaZulu-Natal.** Please be informed that I have sought the necessary permission in advance from the KwaZulu-Natal Department of Basic Education and have been granted approval.

This study aims at exploring the experiences of subject advisors in promoting teaching and learning in schools. The planned study will focus on the subject advisors in the ████████ District. The study will use semi-structured interviews and documents review. One interview will be held with each of the participants and will last for approximately 45 minutes.

PLEASE TAKE NOTE THAT:

- There will be no financial benefits that participants may accrue as a result of their participation in this research project.

- Your identity will not be divulged under any circumstance/s, during and after the reporting process.

- All your responses will be treated with strict confidentiality.

- Fictitious name will be used to represent your name.

- Participation is voluntary; therefore, you are free to withdraw at any time you so wish without incurring any negative or undesirable consequences/penalties on your part.

- The interview will be audio-recorded and transcribed.

- You will be contacted in time about the interviews.

For further information on this research project, please feel free to contact my supervisor, Mr Mthiyane at 031 260 1870 / 073 377 4672. E-mail: Mthiyanes@ukzn.ac.za. In addition, should you have any queries please feel free to contact me directly using the following contact details: Jeffrey Shozi at 031 791 2239 / 073 245 8635. E-mail: jeffsho@webmail.co.za.

Please find enclosed a consent form and a copy of the letter received from the Department of Basic Education granting permission.

Your anticipated positive response in this regard will be highly appreciated.

Thanking you in advance.

Yours sincerely

Jeffrey Shozi (Mr)

APPENDIX E

DECLARATION OF CONSENT FROM SUBJECT ADVISORS

Declaration

I .... (Full name of participant)
hereby confirm that I have been informed about the nature, purpose and procedures for the
study **The role of subject advisors in supporting instructional leadership in schools: the
case of one education district in KwaZulu Natal.**

I have also received, read and understood the written information about the study. I
understand everything that has been explained to me and I consent voluntarily to take part in
the study.

I understand that I am at liberty to withdraw from the research project any time should I so
desire.

Signature of Participant: _____ Date _S|o9|13__

Signature of Witness _____ Date: _S|o9|13_

APPENDIX F

BIOGRAPHICAL DETAILS OF THE SUBJECT ADVISOR

The role of subject advisors in supporting instructional leadership practices in schools: the case of one education district in KwaZulu-Natal.

1. **Biographical information of the participant**

   1.1 Highest educational qualifications in your subject

   HISTORY III (BA BA Degree + HDE)

   HISTORY PRACTICALS

   1.2 Position held and work experience

   Deputy Chief Education Specialist

   07 Years experience as Deputy Chief Education Specialist

APPENDIX G

INTERVIEW SCHEDULE

1. As a subject advisor, what do you understand to be your role in supporting teaching and learning in your district? Please explain.

2. What do you actually do to support and manage teaching and learning in your district? Please elaborate.

3. How do you collaborate with other stake holders as you support and manage teaching and learning in your district?

4. What are the challenges/barriers (from teachers, learners, DoE, teacher unions, parents, etc.) that you experience as you enact your leadership and management practices of teaching and learning in your district? Please elaborate.

5. How do you overcome the challenges that you experience as you support and manage teaching and learning in your district?

6. In conclusion, is there anything you would like to share with me as a researcher on teaching and learning which I have not asked you but you feel is important? Please feel free to share with me.

APPENDIX H

DOCUMENTS REVIEW SCHEDULE

The documents that will be reviewed will not be older than five years and will be:

1. Subject policies, results improvement plan for the subject, minutes of the meetings with the principals, HODs and subject teachers. These will be discussed and the deliberations recorded.

2. Monthly plan for the subject advisor.

These official documents will be used to corroborate the interviews thus improving the trustworthiness of the findings. The documents may reveal aspects that were not found through the interviews.

Participant	: ███████
Date of the review	: 18 September 2013
Name of the document	: Intermediate Phase Orientation Workshop (Gr 4 - 6)
Date created	: 21 February 2013
Content summary	: This was the attendance register for the above named workshop held in ████████ on the 21st of February 2013 from 12 hrs to 15 hrs. Three people, including the participant (Mr Brown), facilitated this workshop. According to this attendance register, 17 teachers attended. Teachers had to sign this register reflecting their names, names of their schools, post levels at their schools, their persal numbers as well as their contact details.
Significance to the study	:This document corroborated Mr Brown's utterances that he conducted orientation workshops for teachers as a way of supporting teaching and learning activities. This document formed part triangulation and trustworthiness of the findings.

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6 DECEMBER 2013

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TO WHOM IT MAY CONCERN

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

'SUBJECT ADVISORS IN SUPPORTING INSTRUCTIONAL LEADERSHIP PRACTICES IN SCHOOLS: THE CASE OF ONE EDUCATION DISTRICT IN KWAZULU-NATAL' by J. Shozi.

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

Yours faithfully

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