BUSINESS LEADERSHIP CONTINUING PROFESSIONAL DEVELOPMENT OF EDUCATION MANAGEMENT TEAMS IN A SOUTH AFRICAN SCHOOL GROUP

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BUSINESS LEADERSHIP CONTINUING PROFESSIONAL DEVELOPMENT

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Abstract

The business leadership continuing professional development (CPD) needs of senior education management teams in a South African school group were explored in this study. The group is a private education company geared towards a high quality yet affordable education and has different types of schools adapted to specific markets. This qualitative study used an online survey with a list of 50 possible business leadership competencies relevant to education management. Respondents rated the urgency of each competency and matched them to 1 of 6 possible continuing professional development activities. A pilot study was first conducted with one school having 7 respondents to validate and refine the survey mechanism. The results from 35 respondents of the main survey were analyzed using descriptive statistics, and follow-up interviews discussing the results were conducted with 4 business managers at the group head office. It was found that the education managers’ top-rated CPD method was a course with other schools in the region over a few days. The top 5 rated prioritized competencies from the combined scores of education managers in the survey and business managers in the interviews were stress management, conflict resolution, financial management, performance management, and customer relationship management. Business managers and education managers did not agree on all the priorities, but all these 5 occurred in both of their top competencies. The study confirmed the findings of the literature review, answered the research questions, discussed options for the South African school group for the CPD of these business leadership competencies and suggested possible further research issues to be explored.
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I thank my God upon every remembrance of you, always in every prayer of mine making request for you all with joy, for your fellowship in the gospel from the first day until now, being confident of this very thing, that He who has begun a good work in you will complete it until the day of Jesus Christ; just as it is right for me to think this of you all, because I have you in my heart, inasmuch as both in my chains and in the defense and confirmation of the gospel, you all are partakers with me of grace. For God is my witness, how greatly I long for you all with the affection of Jesus Christ. (Philippians 1:3 – 8, NKJV)
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Chapter 1: Introduction

Background of the Study

There is much academic support in various countries for a business emphasis in education management practice and training (Bush, 2006a, 2006b; Court, 2002; Education Queensland, 2002; Lewis & Murphy, 2008; Litfin, 2007; Muse & Abrams, 2011; Phillips, 2004; PwC, 2007; Roberts, 2008; Schleicher, 2012; Smith, 2010; Smith & Riley, 2010, 2012; Snipes, Doolittle & Herlihy, 2002; Stronge, 1998). Charter schools in America have a particularly strong focus on business leadership competencies for their education managers (Campbell, Gross & Lake, 2008; Carpenter & Kafer, 2010; Meyn-Rogeness, 2010).

There is also a need for balancing managerial (or business) and instructional (or educational) leadership in education management to avoid the neglect of either one (Hallinger & Snidvongs, 2008; Huber, 2004; Johnson & Maclean, 2008; Lovely, 2004; Ozar, 2010; Scarnati, 1994; Williams, 2012). However, there is also some opposition to the idea of business in education (Ball, 2009; Busher, 2006; Gronn, 2002; Hughes, 2005; Kimber & Ehrich; 2011; Olsen, 2002; Perella, 2012), but even many opponents were sympathetic to the idea that business competencies are required in education management (Bennet & Anderson, 2003; Hoyle & Wallace, 2005; Leithwood, 2003; Leithwood, 2010; Leithwood, Begley & Cousins, 2005; Leithwood & Riehl, 2003; McDonald, 2011; McInerney, 2003; Mukoma, 2010; Novak, 2002)
Statement of the Problem

Research in various countries has shown that education managers need good business leadership competencies and that these competencies should be fostered through continuing professional development. Studies in South Africa (Botha, 2006; Heystek, 2007; Mkhize, 2010; Mpungose, 1999; Mukoma, 2010; Ngcobo & Tikly, 2010; Nkambule, 2010), Australia and New Zealand (Education Queensland, 2002; Macpherson, 2010; Smith, 2010), Britain (Bush, 2006a, 2006b; MacBeath, 2005; PwC, 2007; Southworth, 2010), the USA (Levine, 2005; Muse & Abrams, 2011; Perella, 2012; Postlewaite, 2004; Snipes, Doolittle & Herlihy, 2002; Southern Regional Education Board, 2007; Teitel, 2006; Turnbull, White, & Erikson, 2010), many European countries (Vidoni, Bezzina, Gatelli, & Grasetti, 2008) and all the Organisation for Economic Co-operation and Development (OECD) countries (Australia, Austria, Belgium, Canada, Chile, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, Korea, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, United Kingdom, U.S.A) (Schleicher, 2012) have identified the need for business leadership competency continuing professional development in education management teams.

Improving business operations could improve the quality of instructional leadership in schools (Snipes, Doolittle & Herlihy, 2002). Good leadership competencies transcend both fields of education and business, and schools could learn much from the world of business (Phillips, 2004). The use of appropriate business leadership competencies could be helpful in an educational organization (Litfin, 2007). Business
leadership competencies are particularly required in independent schools, more so than public schools, especially those schools that are profit-driven (Roberts, 2008). Education managers could learn much from business leadership (Stronge, 1999).

Research Questions

This research was conducted to examine which business leadership competencies were most needed in the context of a South African private school group and how best they could be fostered through continuing professional development. There were two pairs of central research questions that this dissertation answered. Smith (2010) posed five questions to his interviewees. These were slightly modified to form the basis of the two pairs of research questions for this study and the interview questions for the business managers at the head office of the South African school group that was the subject of the study.

1. Identifying the priorities of required business leadership competencies.
   a. What are the most important business leadership competencies that are required by private school managers in their jobs?
   b. Which of these business competencies need the most development in this particular South African education group and with specific school management teams?

2. Formulating a strategy for developing these 50 business leadership competencies.
   a. How effectively have managers been equipped for business leadership through their past education, training and development?
   b. How can these competencies be most effectively developed in the future?
The research questions were answered by a systematic, qualitative research methodology through an online questionnaire for education managers and interviews with business managers in the South African school group.

Overview of Methodology

The online survey for education managers which was located at http://www.surveymonkey.com and subsequent interview questions for business managers answered both pairs of research questions.

1. Identifying the priorities of required business leadership competencies.
   
   a. What are the most important business leadership competencies that are required by private school managers in their jobs? This question was answered by the respondents’ selection from the list of 50 competencies identified in the literature review and presented in the online survey. An option for an ‘other’ competency was given for the respondent to add anything not mentioned. This enabled the identification of the most important business leadership competencies required by education managers in the South African school group.

   b. Which of these business competencies need the most development in this particular education group and with specific school management teams? This question was answered by the ordinal ranking of the respondent in page 3 of the online survey and enabled the competencies to be prioritized according to a simple descriptive statistical analysis.

2. Formulating a strategy for developing these 50 business leadership competencies.
a. How effectively have managers been equipped for business leadership through their past education, training and development? Managers’ preparedness is implicit in the ordinal ranking of responses that were given on page 3. An option for an ‘other’ strategy not mentioned was given for the respondent to add anything else. This option identified other important ‘gaps’ in business leadership competencies that respondents detailed.

b. How can these competencies be most effectively developed in the future? This question was answered by the respondent on page 2 (generic options for CPD) and page 4 (specific responses that allow for extended qualitative discussion by the respondent). Answers helped identify the CPD methods most appropriate for each competency.

An interview to analyze education managers’ survey results was then conducted with the business managers at the South African school group head office. They were presented with the results and asked to respond. It is hoped that this research will not only help the specific private South African school group to plan, develop and implement its business leadership continuous professional development for its education managers, but also will be generalized and used for other school groups in other places and lead to further research in various areas.

Definitions

Bush (2006b) defined certain terms in education administration, leadership, and management which enabled the standardization of words that have been used in different ways in various countries.
The concept of management overlaps with two similar terms, leadership and administration. Management is widely used in Britain, Europe, and Africa, for example, while administration is preferred in the United States, Canada, and Australia. Leadership is of great contemporary interest in most countries in the developed world… Administration is not associated with lower order duties in the U.S. but may be seen as the overarching term, which embraces both leadership and management (p. 2).

In this dissertation the distinction is made between education managers and business managers to avoid confusion. Education managers are defined in this study as educators in South African school groups that have worked their way through the relevant education system to become leaders in their organization. According to the business managers, the education managers have had little or no formal or informal business education or experience outside the education sector. For most of their careers they have been focused on instructional management, but in their management positions they are compelled to deal with the business function of the school. The South African education managers make up the executive teams of the schools, which in this group could include phase heads (in charge of junior or senior high, and junior and senior primary phases), operational heads (in charge of pre-primary, primary, or secondary education), and executive heads (in charge of the whole school) (SASG, 2012).

Business managers are defined in this study as South African leaders that have worked their way through various leadership positions (in education and/or business), and are now working in the higher echelons of the South African education group. All are now managers at the head office controlling the administrative functions of the group and
have the South African education managers reporting to them. They are in a unique position to see the business leadership competencies that are required to run a successful South African school and group.

The term competency will be used throughout this dissertation to refer to the combination of knowledge, skills and attitudes (KSA) (McClelland, 1973) of someone being able to do a task.

Taylorism is defined by the business literature as the business perspective that saw commerce as a scientific process that produces a product. In this case the process is education and the product is good academic results. Taylorism emerged just after the Second World War, and sees the school as essentially a factory, a view that both modern management and education theory reject, but it has been replaced by much more progressive views of the ‘new managerialism’ (Waring, 1994).

Customers are defined in marketing as those who purchase the product or service. In the school context the parents are the customers and the service is education. Consumers are defined as those who use the product or service. In the school context the students are the consumers and the service is education (Palmer, 2012).

The Conceptual and Theoretical Framework

Business leadership is an academic discipline that has its roots in the Taylorism of the middle twentieth century, but it has evolved significantly since then (McLaren & Mills, 2008). Education leadership developed around the same time, but many education managers see the two fields as incongruent (Hallinger & Snidvongs, 2008). Indeed, there is a continual tension between the profit (or at least budget maintenance) motive from a business perspective, and that of providing finances for quality instruction (Smith, 2010).
Organization of the Dissertation

This dissertation is organized into four further chapters. Chapter two reveals the tension between managerial and instructional leadership, identifies the most important business leadership competencies for education managers, considers some important business leadership competencies and examines the continuing professional development of education managers. Chapter three details the methodology used in this study. Chapter four reports the results of the research as it relates to answering the two pairs of research questions. Chapter five discusses the study findings and makes suggestions for future research.
Chapter 2: Literature Review

Various researchers have laid sound initial conceptual frameworks, motivated the need for the focus of the study, exposed gaps in the business competencies of education managers, provided a preliminary review, given the initial impetus for this study, and justified the need for more in-depth descriptive study. They examined the necessity of managerial (or business) and instructional (or educational) leadership, identified the most important business leadership competencies, and suggested methods for continuing professional development.

Business Leadership in Education Management

There are a number of views in the academic literature on the place of business leadership in education management.

The Case of Charter Schools

Several authors have examined the heightened presence of business leadership in the USA charter school. Campbell, Gross and Lake (2008) noted that in the USA, managerial leadership is significantly more challenging in charter schools. “For the charter school leader, there is no central office to recruit students and teachers, secure and manage facilities, or raise money and manage school finances” (p. 7). Hence, the charter school leader is forced to develop business competencies, more so than any other school.

Carpenter and Kafer (2010) reported that USA charter school studies show an interesting trend in that principals “from the teaching field were most comfortable with instructional roles and least likely to report confidence with managing budgets and operations, while principals from the business or nonprofit world were the most confident
with these management tasks” (p. 7). The authors showed how the tension between the experience of instructional leaders versus that of business leaders is quite apparent in charter schools. Carpenter and Kafer further observed that some schools have resolved this tension by appointing business managers, but emphasized that this does not absolve the education managers from developing business leadership skills. These education managers are still directly working with the business dimension of education on a day-to-day basis.

Meyn-Rogeness (2010) pointed out that in the USA charter school context “many legislators, school boards, and parents view education in a business-like model. The language we now use to discuss schools: consumers, accountability, efficiency, standardized tests, and competition attests to the neoliberal success in transforming schools into private enterprises” (p. 14 & 15). She outlined, “Together management and market wrestle control of schools from the public and into the hands of ‘responsive’ and ‘entrepreneurial’ ‘senior managers in schools’” and that the “assumption that public problems can be solved with private business management techniques has in part lead to the management of students, teachers, and schools through high stakes standardized testing” (p. 16 & 17). The author insisted that a school should first be seen as a nurturing organization rather than a profit-driven and results-oriented business.

Meyn-Rogeness (2010) was critical of the indiscriminating imposition of a business model on the school through Education Management Organizations (EMOs). “Labor theory suggests a school run by a for-profit EMO will choose the bottom line over all else…. Additionally, in an attempt to show positive financial growth for profit, some EMOs have used business strategies that can negatively impact the teacher workforce,
like a high teacher to student ratio” (pp. 40 & 41). Furthermore, “Alongside the importation of business models into education is a set of policies that strictly regulates educational professionals through the focus on test outcomes, performance measures, and productivity” (p. 41). The author was critical of approaches that try to focus on measuring the success of education and the business-driven mechanisms used to achieve this success in charter schools. “Market theory claims for-profit schools will raise student achievement” but “for-profit firms involved in education must always have their eye on the bottom line in order to stay in business”. Meyn-Rogeness further stated that “research has shown that if left unregulated, private companies will sacrifice reasonable student to teacher ratios for the bottom line” and the “level of individualized instruction is questionable as it is in direct opposition to…their need for profitability” (p. 47). The author was concerned that if the quality of education was sacrificed for profit and results, then it would be no longer serving its primary purpose.

The Need for Both Managerial and Instructional Leadership

The academic literature elucidates the relationship between the concept of the managerial leader and the instructional leader in educational leadership. The former deals more with business processes and the latter with the education of people. Education management consists of a balance between the educational or instructional function and the management or business function of school leadership.

Scarnati (1994) stressed the importance of both instructional and business management for school principals. Lovely (2004) pointed out that “Although the educational content might vary from business world content, the issues faced by school
leaders parallel the issues plaguing many senior level managers” (p. 49). Business leadership, he argued, had to be practiced by school and business managers.

Huber (2004) recognized the implicit tension between working with people in an education context and running the business side of things. He admitted that in school leadership “Some areas or role segments relate to working with and for people, others to managing resources like the budget” which form “the complex range of tasks the school leader faces in the 21st century”. Somehow, though, they must be integrated effectively and work together in a symbiotic relationship to form a beautiful “colored patchwork” (p. 671). He emphasized that balancing these two sides of a school are fraught with difficulties and pitfalls, yet somehow it must be done.

Johnson and Maclean (2008) compiled a number of articles addressing the roles of professionalization, development and leadership in education. One contributor noted that “the pervasiveness of a business management-oriented framework with a focus on ‘marketization’ and ‘managerialization’ have all been cited as impacting on teachers – as well as the special demands of being required to educate children for the future” (p. 25). The author highlighted the tension between the teacher’s role as educator and that of business professional. He argued that school leaders focus more on their role as a business professional than on their role as an educator, by the nature of their jobs. Another contributor to the book referred to comments from a teacher “that her non-teaching workload creates for her a high level of concern about her capacity to do what she sees as her ‘core business’, which is teaching students and being a professional teacher” (p. 31). The contributor was concerned that even at this level, the administrative management tasks of teachers often overshadow the central instructional management
role. One contributor to the book lamented that he “consistently tried to read books on organizations, but books about business organizations rather than the school as an organization – a field that for some strange reason seems to have become almost deserted” (p. 249). One contributor explained that education has indeed become a very lucrative business in some circles. “With the entry of the business corporations into the private education sector, private education has become a billion dollar business…The privatization of education has led to the emergence of an education market thus commodifying education itself” (p. 275). The contributor was concerned that education was no longer regarded as a ‘special’ and ‘desired’ element of society, but that it was now an everyday occurrence with little value placed on it, like commodities.

Hallinger and Snidvongs (2008) argued “for an integration of selected business-related understandings of organizational management that are highly relevant for the improvement of schools” (p. 1). They were careful in their use of business terminology, but did not avoid applying it to the field of education. However, they did not simply want to replicate business patterns in schools. “We reject the idea that school management should simply copy the management of business firms” (p. 9). Their goal was to “identify under-emphasized areas of managerial competence in the school leadership curriculum” (p. 27). They recognized that business and instructional competencies are both crucial for education managers.

In an interview, Ozar (2010) asked a prominent clergyman involved in Catholic school leadership: “Are the places where we look for these leaders different than they used to be?” The answer given was that “We need to look for people with strong content skills in education and overlay that with exposure to business and accounting and
personnel” (p. 115). According to the author, both instructional and business leadership are required for school leadership.

Williams (2012) examined the similarities between education and business. “The business industry and the field of education are similar in that human capital is a necessary component to the success of both fields” and “education, in some instances, mirrors the business industry in that attracting, developing, and maintaining capable employees is critical” (p. 9). He reported that “Many authors have identified skills sets, traits, and attributes which describe successful leaders in the field of education as well as the business industry” (p. 24). Managers in education and business require many of the same competencies.

Against a Business Emphasis in Education Management

Gronn (2002) had some concerns about school leadership standards in the UK and USA, including their links to business. Olsen (2002) noted of The Organisation for Economic Co-operation and Development (OECD) that “Several reports by OECD/Sigma have advised the CEECs [Central and Eastern European countries] not to copy business methods and NPM reforms in Western Europe” as “It is impossible to simply adopt Anglo-Saxon administrative cultures and such prescriptions are likely to have detrimental and disastrous consequences for the CEECs” (p. 16). The author emphasized that what works in one business culture may not work in another and cannot simply be replicated according to a particular cultural frame of reference.

Grace (2005) expressed his concern about seeing schools as specialized types of businesses. “Are headteachers, as they become chief executives or senior managers, introducing line-management and hierarchical systems in the interests of rapid, executive
action?” (p. 46). He warned that the focus on effective management should not overshadow the distinctive human element of education, as education was about people, not just processes.

Hughes (2005) reacted against seeing the school as a factory according to the model of Taylorism. In this view “teachers become automated with scripts to follow, students become receptacles that are disposed of if they do not meet the standard, and learning is driven and measured by the bottom line.” The author was concerned that in this perspective processes, profits and performance become more important than people, education and formation. He emphasized that for some “in the era of high-stakes testing when scores are the litmus test for success, uniformity and standardization of teaching practices and student performance gives schools the market advantage” (p. 211). Education, he argued, is more than just getting good results. He concluded with an appeal to those with a Taylorist perspective of education. “The business of school is not like the business of a factory. The factory model may work effectively and efficiently when building widgets but educating people requires a different culture” (p. 294). The author was not denying the business element of schools, but rejected simply seeing the school as an organization of mass production.

Bush (2006) outlined some of the highlights of the debate in the last decades of the last century in Britain. He lamented the neglect of instructional leadership in the focus on managerial leadership stating that “some recent literature that focuses on the application of Quality Management to education specifically excludes students from being actors who are part of educational institutions, casting them instead as customers” (p. 5). Of course, by definition in the business literature, the customers are the parents
and the consumers are the students. Parents pay for the service of education and students make use of it. He further complained that “the unreal world of the perfect market, has dominated the rhetoric and shaped the educational debates of the last two decades of the twentieth century in the UK” (p. 12). The author was concerned that a business focus was diverting attention from the very important instructional issues that needed to be addressed.

Ball (2009) was concerned about applying the “business models of change management” (p. 85) to schools, where the “generic concepts … at the organisational level have no specificity to education or schools” (p. 87). Sheppard et al. (2009) suggested that some believe “that the strategic planning format employed by business has met with generally low levels of success within the education community because it attempts to modify existing business models to the unique demands of education planning” (p. 79). The authors warned that no business model can be imposed on the school without adapting it to the very specialized demands of the educational environment.

Kimber and Ehrich (2011) were concerned about the growing emphasis on managerial rather than instructional leadership. “By devolving more management functions to school principals, those promoting managerial practices in schools accord greater weight to generic management skills than they do to substantive knowledge of educational leadership”. Kimber and Ehrich further stated that this “stress on private sector business factors has been de-professionalising school leaders” or at least the “feeling that their professionalism was being undermined.” The authors suggested that although “the proponents of school-based management have, in effect, sought to
strengthen principals’ and teachers’ contractual accountability to governments” that “they have also weakened the professional and moral accountability…that principals have to their teacher colleagues and to their students” (p. 16). The authors warned that with an emphasis on management comes a weakening of instructional leadership, the primary goal of the school.

Perella (2012) noted an “apprehension with the establishment of a common language in public education by a program that is based on business and military models” (p. 20). He was concerned that in “the case of contemporary public education reform, pro-business and neoliberal influences are driving school reform efforts” (p. 26) He believed that it has been “the global business influence that has driven contemporary education reform” (p. 35). He identified that the “Arguments in favor of pro-business methods and principles of education have a prominent voice in contemporary education reform” (p. 41). He added that “There is also substantial concern about the basis of current business orientated reform in regards to the correlation between the economy and the education system” (p. 42). He noted that one of the indicators of a neoliberal agenda in education was “Business supported school reform that stresses accountability, data-driven decision making, performance pay and standards that promote completion; Using the business philosophy that stresses business operations and belief systems” (p. 43). He lamented that “current political leanings (both Democratic and Republican) are in agreement with the contemporary economic-based goals of neoliberal and pro-business education programs” (p. 44). The author was critical of the establishment in both major parties (Republican and Democrat) in America, and felt that their education agenda was
driven by business motives and not the ideal of the best education for the benefit of the people.

Cautious but Sympathetic Views

Kenneth Leithwood

Leithwood and Riehl (2003) admitted that “there are still many gaps in our knowledge about effective educational leadership. For example, how can educational leaders balance their leadership and managerial responsibilities in ways that move their schools forward?” (p. 7). The authors identified the ‘gap’ between leadership and management in schools.

Leithwood (2003) described the business side of school leadership, emphasizing the importance of “creating and sustaining a competitive school. This is important when choice options and market conditions eliminate monopolies over enrollments and require schools to compete for students” (p. 5). The author emphasized that competition for business in a free market economy affects independent schools just as much as it does any other private organization. He feared that the appearance of more alternatives has made it a ‘consumer market’, and schools that ignore this business approach do so at their own peril. He stressed that it will mean that if they do not remain competitive, then consumers will ‘vote with their feet’.

Leithwood, Begley, and Cousins (2005) wrote their book “primarily about leadership, but it is also about how to carry out managerial work in a way that contributes to leadership” (p. 4). The authors outlined the tension between managerial and instructional leadership. They recounted that before 1985 principals “were claimed to play a largely ‘manager’ role or a largely ‘leadership’ role: they were concerned mostly
with administration or with instructional leadership…consumed by managerial or administrative tasks, but desired practice best captured in leadership roles focused on such substantive educational decisions in the school as instruction” (p. 16). The authors emphasized the former primary function of instructional leadership in the school but admitted the challenges of the important secondary role of managerial leadership. They were concerned that the change to the “transformation of primarily managerial goals into criteria for decision-making sometimes led to questionable emphases in the school” (p. 71), particularly affecting instructional leadership. They showed that, “Among all tasks, respondents expressed least confidence in their ability to perform what we have been calling ‘managerial’ tasks” and that “managerial categories of tasks also contain a higher proportion of specific tasks in which school-leaders are least confident. Managerial tasks are a source of greatest uncertainty for all school leaders” (p. 164). The results of their research “indicated a lack of confidence in performing managerial tasks; this might be due to our zeal to focus school-leaders on ‘educational’ aspects of their role, which would cause their managerial preparation to be badly neglected” (p. 169). The authors admit that in the focus on preparing school leaders for the role of instructional leadership, preparation for the role of managerial leadership is sometimes neglected. They concluded that “school leaders, no matter what the image of the role, pattern or stage of socialization or gender reported, feel least confident about their mastery of managerial routines” (p. 260). According to the authors, the school leaders themselves expressed their lack of confidence in their managerial roles.

Leithwood (2010) posited that the academic “underperformance of schools and districts can sometimes be traced to district and school administrators adopting either
laissez-faire or largely managerial approaches to leadership” (p. 11). The author insisted that school administrators need to be fully engaged in instructional leadership. Leithwood further stated, “A managerial orientation on the part of administrators has dominated district organizations.” However, “in schools, the growing focus on both transformational and instructional forms of leadership pushes against a long history of preoccupation by principals with the management of school operations” and “has often been cited as a primary cause of school underperformance” (p. 13). The author warned that a neglect of instructional leadership by focusing too much on managerial leadership will affect school performance.

Other Authors

Novak (2002) noted that some people “argue that schools should be run like businesses, with students seen as either raw material to be shaped or customers to be satisfied” and “although acknowledging that there are productive business practices from which educators can learn”, the author insisted that “these perspectives are short-sighted and miss the educational heart of schooling for a democratic society” (p. viii). In his view any “ethically fit style of educational leadership can best use ideas from business or other forms of leadership if it is cognisant of the distinct qualities aimed for in educational ideals and school practice…because it is grounded in the unique set of intentions and principles inherent in educational experiences (p. 4 & 5). He reported that “Educators … are being challenged to…operate their schools more like businesses. Words like ‘customers’, ‘competition’ and ‘change’ are routinely used to describe the new global and educational reality”, and so “many educators reject the ferocity of the business models that are being thrust upon them…are suspicious.” Educators “feel that the language and
aims of business diminish the important work they have been doing and cut out the heart
of their educational sensibilities”, but “to redirect schools in businesslike directions, and
to direct this redirection in educationally sound ways, it is necessary to get a clearer
framework for thinking about schools and education” (p. 6). In conclusion he asked,
“What is so important about leading for educational living and how is it different from
business leadership?... Business is primarily about making a profit. Education is about
learning how to savour, understand and better more individual and collective
experiences” (p. 15). The author was concerned that with the focus on profit, quality
education would inevitably be sacrificed.

McInerney (2003) showed how the role of school leaders has changed in
“instrumental ways in line with their role as business managers, rather than as educational
leaders” (p. 66). The author recognized its inevitability in a globalizing world, but warned
of its dangers. Bennet and Anderson (2003) incisively affirmed the need for managerial
leadership, but warned of the dangers of simply maintaining a managerial ‘system’.
“Although this approach often results in a hierarchical and bureaucratic structure that is
anathema in these postmodern times, there is still the need for such diligence...There is a
need for managerial leadership in moderation, and moderation in management” (pp.
15&16). They warned of the hierarchy and bureaucracy that often accompanies
managerial leadership. The authors were not questioning the necessity of operations
management, budget control, resource management, human resource management,
strategic management, and business administration in managing a school, but the fact that
it takes the focus off education (the core business of the operation) was a real concern to
them. A simple, scientific Taylorist approach, developed in the “middle of the [20th]
“century” (p. 15), which views organizations like factories, is certainly to be avoided, according to the authors, but this does not mean that sound business principles can be ignored.

Hoyle and Wallace (2005) observed that “popular, mainly US, business management literature has been a key source of managerialist ideas for policy-makers concerned with reforming education and other public services” (p. 72), but warned that The potential threat to education is that the professionalization of leadership and management fosters the emergence of an ideology which, first, bestows greater significance on leading and managing than on learning and teaching; and second, equates the professionalization of teaching with teachers internalizing the values of excessive leadership and management. (p. 105)

The authors were concerned that emphasizing managerial leadership would eclipse instructional leadership and dilute its values amongst educators. Hoyle and Wallace further purported, “Temperate leadership and management entail a recognition of the nature of education as a social institution and, particularly, that as an institution it differs in fundamental ways from business” (p. 194). The authors were very open for education managers to learn from business, but they cautioned against seeing schools simply as different forms of business and not as the unique, nurturing organizations that they should be.

Mukoma (2010) warned that the “success of any organisation or community structure depends on efficient leadership and management. A business venture that is poorly managed will head for bankruptcy; a school whose principal cannot lead and who is an inefficient manager will lose both its best educators and learners” (p. 1). He
recognized that the school needs to, at the very least, remain solvent to continue existing. However, he recounted the story of the woman caught in adultery (John 8:10-18) and exhorted that “Only truly strong leaders can be truly gentle. Gentleness is a quality of leadership that has been lost in business dealings, classrooms and homes” (p. 35). The author suggested avoiding a ‘hard’ business approach and advocated servant leadership in education management. Mukoma further addressed the issue of power and stated, “When people think about leadership they think of power. This applies to leadership in Church, school, business and anywhere there are people…The problems we are facing… are due to misuse and abuse of power because of moral decay” (p. 37). The author advocated a gentle use of power in the business processes of the school to maintain the integrity of the educational environment.

McDonald (2011) stressed that though “schools differ from most business organizations because their primary inputs and outputs are people, rather than material goods or services, there are some elements of practice that are relevant to both schools and business.” He mentioned a number of elements, including “managing internal tensions”, “the realities of a changing and complex society”, “the problems of trying to operate in a highly turbulent environment”, “rates of change, fueled by increasingly rapid technological alterations”, and “organizational design which provides alternatives which enable them to manage within the turbulent complexity of the social environment.” However, despite all these similarities, he noted that the “appropriateness of the use of organizational development strategies applied to public school settings continues to be questioned” (p. 43). This view is certainly supported by the authors that have been considered in the last two sections.
Supportive of a Business Emphasis

Stronge (1998) asked if there is “common ground between the attributes of school leadership and business leadership? While the school is a unique and challenging environment in which to practice, I contend lessons can be learned from the greater leadership community” (p. 3). The author cautiously advocated that education managers could learn much from business leadership.

Gerwitz and Ball (2000) pointed out “that schools effectively function as small businesses” (p. 253), drawn “from the business values and practices of the new managerialism” (p. 259). In their view, schools are specialized forms of business.

Snipes, Doolittle and Herlihy (2002) “identified seven challenges facing four large urban districts that had significantly improved the learning of their students” one of which was “unsatisfactory business operations, including… commitment to system efforts to improving education quality” (p. 40). They showed that improving business operations can improve the quality of instructional leadership.

Education Queensland (2002) stated that “there is a need for a redefinition of the purpose of public education that meets the unique challenge posted by the transition to a globalised economy and society” (p. 8). It specifically identified that “Business skills are needed in the workforce for schools to manage their social role and be part of the learning program” (p. 20). It insisted that business leadership has a place in education management.

Court (2002) identified a possible model of shared school leadership of “split-task dual leadership one co-principal carries out the ‘business’ administration, while the other carries out instructional leadership” (p. 2). This model has been implemented in some
educational circles, particularly through the School Administration Manager (SAM) (in the USA) and School Business Manager (SBM) (in the UK) positions.

Phillips (2004) reported that according to extensive research, “The consistency of findings between corporate and educational settings suggests that good leadership is good leadership, regardless of its setting, and that school leaders might benefit from the study of organizational leadership trends in the business world, which tend to forerun schools in organizational change and effectiveness” (p. 23). His conclusions were that good leadership competencies transcended both fields of education and business, and that schools could learn much from the world of business.

Bush (2006b) was convinced that the British National College for School Leadership (NCSL) “stress on leadership has led to a neglect of management. Visionary and inspirational leadership are advocated but much less attention is given to the structures and processes required to implement these ideas successfully.” A sound education management philosophy dare not neglect “the structures and processes” (p. 2) for the practical implementation of ideas. The author clarified that leadership and management are distinct concepts, though they do overlap somewhat, and leadership must transcend mere management (p. 3). Bush (2006a) gave a more detailed critique of the NCSL. The author argued that the NCSL neglected the practical demands of management in their emphasis on leadership. He emphasized that this is where many education managers fall short: They have great educational ideas, but lack the management skills to be able to implement them effectively.

Litfin (2007) suggested that successful leadership strategies in schools should include “what other business leaders have done to re-establish a successful climate and
get their organizations pointed in the right direction in the hope that educational leaders may use these strategies to gain some ground in failing schools” (p. 76). He suggested that just “as these relatively common-sense frameworks and philosophies have been shown to be effective in business, they should cross directly over to educational settings and work effectively, since the two worlds share many issues and scenarios” (p. 81). He did not promote an indiscriminate duplication of everything from business in the school, but he did encourage the use of appropriate business leadership competencies in an educational organization.

PwC (2007) summarized the findings of its comprehensive independent research into school leadership, pointing out that the changing world requires new ways of school management. It questioned whether school leaders have the “characteristics, skills and areas of expertise” (p. 27) that are required of heads.

Indeed, given that many respondents in all phases of the study thought that the role of the school leaders has become more akin to business administration, it is legitimate to question whether current leaders have, or have access to, all the necessary skills to meet the challenges of the future (for example, 50% of heads in the primary sector are responsible for the school budget on a day-to-day basis) (p. 27).

This study noted the change in the headship role since 1980 and emphasized that the focus of heads in the future will have to be on business administration. It identified that education traditionally draws its managers from its own ranks, having come through them with many years of experience. However the study recognized that, unlike fields like IT, education managers are older and less adaptable to change. The role of IT and business
management in education have increased exponentially in the past few decades, and education managers are struggling to keep up with the knowledge and skills that are required (Bizzell, 2011).

Roberts (2008) identified many challenges of independent schools, including “need to market the school in a different way than a mainstream school” and other “challenges that present themselves ‘are those of running any other business’” (p. 94, original emphasis), as identified by a head teacher. The author recognized that business leadership is particularly required in independent schools, more so than public schools. Vidoni et al. (2008) reported how European educational reforms over the past few decades have included the “development of networks, techniques, and managerial instruments derived from the business sector” (p. 111). The authors noted the business trend in education reform in many European countries.

Lewis and Murphy (2008) emphasized that the “Global changes in society and the economy, technological advances and new assumptions about how we relate to one another all suggest that schools as we think about them now will undoubtedly have to change in quite radical ways.” However the concerns that the “mechanistic models of management control were being imported into the public sector from a declining industrial and manufacturing sector” in the 1980s proved unfounded, as “the private sector, in response to great structural changes, was beginning to develop more people-oriented and systems-based approaches to higher management” in the 1990s. In fact with “the emergence of the ‘new economy’ and the growth of service industries, many private sector management texts were beginning to use the language of learning, knowledge management and developmental processes” (pp. 127&128). The authors identified the
significant cross-pollination between the ‘new managerialism’ (Clarke & Newman, 1997) in business and the instructional model of education in the past two decades as both fields have learnt from each other.

Muse and Abrams (2011) found in their research that principals were more concerned about developing managerial than instructional leadership competencies. They show that principals developed instructional leadership competencies over decades of experience, but principals were deficient in managerial competencies. The authors used the Interstate School Leaders Licensure Consortium standards as a framework to examine the role of education managers. They identified that school leaders found it a challenge “to balance the responsibilities of being the instructional leader as well as the school manager” and “although instructional leadership was a priority, it was often overshadowed by school managerial demands.” Their “findings suggested that an increased focus on professional development for administrators in the area of management is especially needed.” The “administrative function” of “the school manager” is driven by “school managerial demands” and has “increased focus on professional development” for the education managers to cope (p. 49). Muse and Abrahams further argued that with increasing job demands and accountability, balancing the roles of instructional and business leader is becoming increasingly challenging. Their research identified the greater need for the development of business leadership competencies rather than instructional leadership competencies in school leaders.

The Research of Larry Smith

Smith (2010) researched the business side of education extensively and identified the tension that
school leaders now have little choice other than to include business leadership as part of their contemporary role and that, as a consequence, they find themselves in the uncomfortable position of having to attempt to balance what they inherently hold to be extremely important educational values and processes with what they increasingly realize are fundamentally essential commercial and business imperatives. (p. 2)

The “extremely important educational values and processes” focus on spending money on the personal development of students, while the “fundamentally essential commercial and business imperatives” demand a carefully controlled budget (Smith, p. 2). His implication was that school leaders are reluctant to focus on the business side of education management, largely due to the fact that they do not feel well-equipped for it, but the dire need for it is forcing them to pay attention to it.

Smith (2010) geared his 2007/8 research “to develop an understanding of the ‘business’ dimension of school leadership, and of the professional development support that school leaders require and desire in order to lead the business dimension of their role effectively” (p. 2). Smith and Riley (2010) wrote their book to “assist school leaders to develop the necessary knowledge, understanding and competencies that they need to provide effective leadership for the business side of their schools” (p. xiv). Their study was done through a series of semi-structured interviews in 2007-8 with a sample of 39 school principals from a wide range of schools in Queensland, New South Wales and Victoria in Australia. Their respondents were drawn from both metropolitan (urban) and regional (rural) schools, secondary and primary schools, independent, and government
schools, and with varying years of experience amongst them. The questions that they asked were:

1. What are the business roles, responsibilities, and activities of school leaders in today’s schools?

2. What proportion of the school leader’s professional time is generally devoted to business activities and imperatives?

3. What business processes cause school leaders the most difficulty or anxiety and why?

4. How well are school leaders prepared for and supported in the business dimensions of their roles?

5. What strategies and processes do school leaders generally employ to deal with, or cope with, the business side of their roles?

Smith (2010) extracted some valuable data through these questions relevant to the business leadership role of the education manager.

The Extensive OECD Study

Schleicher (2012) suggested in the significant OECD study on leadership in the teaching profession that “education systems need to transform the leadership and work organization of their schools to an environment in which professional norms of management complement bureaucratic and administrative forms of control” (p. 13). The author criticized the Taylorist approach that many schools have towards simply seeing pupils as products on the factory assembly line, yet he emphasized the need for school leaders to achieve “professional norms of management” (p. 13). Further, he recognized
that many views of ‘business leadership’ in education are tied to caricaturing current business leadership practice with Taylorist concepts of business leadership and not engaging dynamic modern theories in ‘the new managerialism’ (Clarke & Newman, 1997). Unfortunately, the author noted that many corruption scandals in business in recent years have reinforced this idea in the mind of many educators that education and business are incompatible. However, he argued, the issue is not business per se, but rather the corruption of good business practice (p. 14).

Schleicher (2012) outlined the status of education leader development in various other OECD countries. He gave the example of how The Leadership Academy in Austria defined the role of school leaders in terms of strategic leadership, instructional leadership, human resource management (HRM), organizational development, change management, aspects of lifelong learning, and administrative skills (p. 20). Most of these competencies were clearly identified by the author as good business leadership competencies.

Schleicher (2012) was very positive about the approach that the Scottish Executive Education Department was taking in specific areas: project leadership, team leadership, school leadership, and strategic leadership. Three of these “four broad areas” are distinctly business leadership competencies, and the other is simply generic “school leadership. These “business concepts” were rarely emphasized in education management circles just a few decades ago, but the OECD study showed the need for project, team and strategic leadership competencies in schools today (p. 27).

Schleicher (2012) succinctly summarized the state of training of school leaders in OECD countries. Though the training for school leaders was available, it was not adequate, and “they are not necessarily competent in pedagogical innovation or in
managing financial or human resources” (p. 26). This study showed the inadequacy of training for school leaders in general.

Education Management Programs with a Business Emphasis

Postlewaite (2004) reported on various American initiatives to incorporate business competencies into educational leadership development. For example, he described the BellSouth Foundation and the Center for Leadership in School Reform which offer “the superintendents a new model for expanding leadership capacity by drawing from a variety of proven business concepts and incorporating those practices into professional development opportunities” (p. 13). He showed how business leadership skills are being actively developed in education managers by various organizations.

MacBeath (2005) outlined a number of programs in the UK that integrate business elements into education management development. “The Investors in People (IIP) Standard is a business improvement tool ‘designed to advance an organisation’s performance through its people’... designed as a flexible framework which a school can adapt for its own requirements, mirroring the business planning cycle of plan, do, review” (p. 6). The author also mentioned other programs with a business emphasis used in education management development, including The Charter Mark program, the ISO 9000 Quality Management System and The European Foundation for Quality Management (EFQM) Business Excellence or European Quality Award.

Levine (2005) called for a redesigning of “educational leadership programs” for a more “relevant and challenging curriculum designed to prepare effective school leaders.” He suggested the development of a “Master’s in Educational Administration… to equip graduates with the skills and knowledge necessary to lead today’s schools, not yesterday”
which would be “the educational equivalent of an M.B.A…consisting of both basic
courses in management (e.g. finance, human resources, organizational leadership and
change, educational technology, leading in turbulent times, entrepreneurship, and
negotiation) and education…. rigorously combining the necessary education subject
matter and business/leadership education” (p. 66). The author acknowledged that the
changing education management demands of modern society required a balance between
business and instructional leadership preparation.

Teitel (2006) described various education leadership development programs that
“consciously tap into business and corporate expertise” (p. 9) including Stanford’s
Executive Program for Educational Leaders, Harvard’s Public Education Leadership
Program, the for-profit District Management Council, Western Benchmarking, and
Aspen. The author showed how these programs draw from the best elements of business
leadership that are most relevant to the school management situation.

The Southern Regional Education Board (2007) reported how the Delaware State
Action for Education Leadership Project “builds partnerships with businesses to help
school leaders learn succession planning from business leaders” (p. 13), and how the
State of West Virginia in 2004 “created a program to bring business leaders into
struggling schools to mentor and advise principals for three years” (p. 26). They
identified a particular need for business leadership competencies and provided the
necessary solution through continuing professional development.

Southworth (2010) explained two elements of the School Business Manager
(SBM) program. “Schools need business managers, and therefore, it was essential to
ensure there were more of them. Second, they need systematic training to ensure the
quality and effectiveness of SBMs remains high” (p. 6). This fulfils “the need for
distributing the leadership of business management within schools” (p. 12). One SBM
responded to an interview that “I think SBMs save about a third of headteacher’s time. I
do all the finance and will then meet with the head to go through it with him. If I wasn’t
in post, the head would have to do this work instead” (p. 25). The author showed how,
besides the obvious position of accountant or school bursar, the SBM is becoming a
common position in schools all over the world. He noted that it frees the principal to
focus on instructional management, but the SBM still reports to the principal, who thus
still requires business leadership competencies. The author documented how some
universities have even begun offering formal qualifications in SBM. Turnbull, et al.
(2010) outlined, evaluated, and critiqued the School Administration Manager (SAM)
program, which is quite similar to the SBM position.

Macpherson (2010) outlined the Postgraduate Diploma in Educational
Management (PGDipEdMgt) and the Master of Educational Management (MEdMgt),
which are courses offered through a partnership of the Faculty of Education and the
Faculty of Business and Economics at the University of Auckland (p. 213). He explained
that “the less popular PGDipEdMgt-MEdMgt route blends business and educational
management education and prepares aspirants for senior management roles and for
strategic institutional leadership. The EdD prepares aspirants for strategic institutional
and system leadership” (p. 228). These programs in educational leadership were designed
in “anticipation of the need for multiagency centre leadership, the integration of business
and educational management for the strategic leadership of institutions and systems” (p.
228). In his view, business has a place in education.
Perella (2012) was impressed with the National Institute for School Leadership (NISL) “application of military and business strategies to educational issues” (p. 3) with their “best practices used to train corporate CEOs and battlefield commanders to the education field… benchmarked the training of school principals worldwide and the training of leaders and managers in business… to create a state-of-the-art executive education program for principals” (p. 7 & 8). The author also mentioned other similar programs integrating business principles with school education, including the Broad Superintendents Academy and New York City’s Leadership Academy.

Identifying the Most Important Business Leadership Competencies

McGrevin and Schmieder (1993) emphasized the business leadership need for operations management, values-based leadership, visionary leadership, participative management, performance management, change management, emotional intelligence, charismatic leadership, and ethical leadership. ISLLC (1996) identified human resource management, operations management, visionary leadership, ethical leadership, client relations, and political leadership as business leadership needs. Clarke and Newman (1997) discussed “the competencies of communication and culture building, network and partnership management, providing good relationships with customers and workforce, and managing complex processes of change and transition” (p. 73) in the ‘feminized’ practice of the ‘new management’.

Waters, Marzano, and McNulty (2003) expounded on 21 leadership responsibilities of the principal, distinct business and education leadership competencies.

1. Foster culture and community
2. Create operating routines and procedures
3. Maintain discipline
4. Provide adequate resources
5. Oversee curriculum, instruction, and assessment
6. Focus the school community on goals
7. Remain knowledgeable about curriculum, instruction, and assessment
8. Interact with teachers and students
9. Recognize and reward accomplishments
10. Maintain lines of communication with students and staff
11. Advocate for the school
12. Elicit input into critical decisions
13. Affirm accomplishments and acknowledge failure
14. Acknowledge personal and relational issues
15. Act as a change agent
16. Inspire and innovate
17. Communicate strong ideals about education
18. Evaluate the impact of programs and practices on student learning
19. Exhibit flexibility and comfort with dissent
20. Remain aware school’s challenges, problems, and undercurrents, and
21. Stimulate the intellectual capacity of staff.

Leithwood et al. (2006) identified the “classification of important leader or manager behaviours” in the school as including “planning and organizing, problem solving, clarifying roles and objectives, informing, monitoring, motivating and inspiring,
consulting, delegating, supporting, developing and mentoring, managing conflict and 
team building, networking, recognizing, and rewarding” (p. 25).

Lockhart (2007) documented that the Georgia's Leadership Institute for School 
Improvement (GLISI) “provides leadership training in the 8 Roles of School Leaders and 
has organized the work of school leadership around these roles that were validated 
against other national educational and business standards…tasks that effective school 
leaders do in their schools to improve school wide effectiveness and student 
achievement” (p. 62). The training of school leaders focuses on the 8 roles which include 
both educational and business standards.

1. Curriculum, Assessment, and Instruction Leader
2. Data Analysis Leader
3. Process Improvement Leader
4. Learning and Performance Development Leader
5. Relationship Leader
6. Performance Leader
7. Operations Leader
8. Change Leader

Their approach integrated developing business and instructional leadership 
competencies.

Mumford et al. (2007) focused on the need for financial management, human 
resource management, estate management, and operations management as priorities. 
Gray and Streshly (2008) noted how human resource management, operations 
management, servant leadership, and values-based leadership are essential to education
management. Engelking (2008) stressed the importance of human resource management, operations management, visionary leadership and participative management. Canavan (2008) highlighted the crucial role in a religious school group of spiritual, instructional and human resource leadership, as well as strategic leadership, planning and management, organizational leadership, and personal dimensions of leadership. These are both business and educational leadership competencies.

Smith and Riley (2010) identified the need for continuous professional development of business leadership competencies in education managers through nine key competencies: crisis management; decision making; financial management; human resource management (HRM); marketing management; performance management; safety, health, environment and risk (SHER); strategic leadership; and time management.

Smith and Riley (2012) took this research further in examining the issue of crisis management. This research was done in Australia and placed crisis management very high on the list of priorities for business leadership competencies. Related to it were conflict management, emotional intelligence and people skills, and stress management.

The CCEAM (2012) conference brought a number of contemporary and relevant issues to light. Innovation and entrepreneurship, organizational political leadership, ecological leadership, global and local leadership, shared and distributed leadership, and enterprise resource management (ERM) were some of the most significant issues.

Continuing Professional Development

Continuing Professional Development (CPD) is an established term in the British educational literature, but is often abbreviated to professional development (PD) in the rest of the world. Campbell, McNamara, and Gilroy (2004) noted the growing place of
‘practitioner research’ in CPD in education. They described that CPD in the last five years has moved from traditional “courses and workshops to workplace and professional learning communities. This move has been accompanied by a gradual realization of the importance of research-based professional development and research and evidence informed practice to promote teaching and learning and school improvement” (p. xii). The authors showed that personal reading, study and research are the foundation to any effective CPD. They established that if the subjects are not personally engaging developing the competencies for themselves, then no training programs will help. However, Campbell, McNamara, and Gilroy maintained that ‘professional communities’ help this reflective approach to be worked out in a broader ‘team’ context and allow the cross-fertilization of learning.

Busher (2006) discussed the “management/administrative approach” to doing CPD with “middle leaders” (that is just as applicable to top management), emphasizing that “a school’s corporate goals and of its institutional/bureaucratic needs… the management approach can offer a means of developing technical skills with colleagues…as long as staff have collaborated with the middle leader in identifying the needs for such training” (pp. 141&142). He noted that managerial (business) leadership can be particularly well developed through active training by connecting all the stakeholders in the professional community.

Hackman and Wageman (2005) distinguished that mentoring and coaching can be done individually or as a team. Khan (2010) identified mentoring and coaching as sound methods for the CPD of school leaders. “Research indicates that schools resemble small organizations, in which people demonstrate similar behaviors and attitudes, but have
different aims” (p. 279). He suggested that “one of the strategies to provide coaching to
school leaders is to identify the potential coaches from other sectors such as businesses
and non-governmental organizations” (p. 279). The authors viewed the influence of
business managers in mentoring and coaching school leaders to be a positive move.

Dumas (2010) and Jansen, Cammock, and Conner (2010) elaborated more ways
that professional learning communities can connect principals in mutually edifying CPD.
They showed how these networks of informal CPD can emerge spontaneously from
formal CPD events and can take a vibrant place in professional development. Henderson
(2011) examined the use of the executive coaching techniques used in business and
applied these to school leaders.

Craft (2000) identified a vast number of CPD methods that can be used, including
action research, self-directed study, research, distance-learning, coaching, mentoring,
tutoring, courses, job shadowing and rotation, peer networks, professional learning teams,
learning partnerships, school cluster projects involving collaboration, teacher placement,
personal reflection, experiential ‘assignments’, collaborative learning, and information
technology-mediated learning (p. 10). Neil and Morgan (2003) abbreviated six main
sources of CPD: private reading, private group research, in-school activities, outside
activities in school, off-site courses, and networking with other schools (p. 93).

PwC (2007) recommended a number of unconventional and creative CPD
methods that could be used in particular circumstances. It suggested “secondments into
business or the public sector and cross-sectoral mentoring programmes. Also encourage
Children’s Trusts to develop training that brings together senior leaders from education,
health, social services and other relevant agencies” (p. xiii). The organization noted that
cross-pollination between industries could be an interesting exercise that may prove quite fruitful for managers, and that education managers may be surprised to see that their issues are not that different to those of managers in other professions.

Chapman et al. (2010) emphasized the benefits that school groups have over individual schools. “Federations provide increased opportunities for sharing staff and other resources, joint professional development, curriculum development, leadership and management” (p. 4). Turnbull, Arcaira, and Sinclair (2011) evaluated the School Administrator Manager (SAM) Innovation Project in many American states. The project typically focused on only a third instructional leadership and two-thirds business leadership competencies implying that the need of the latter was far greater than the former in CPD.

Bizzell (2011) made a connection between technology leadership and the use of technology in CPD in his research. The principals in this study of a region of the Appalachian Mountains hardly ever used digital technologies. “Seven of thirteen principals described no use of distance technology for professional development, and the six others described only minimal use. One principal indicated he didn’t use distance technology because he wanted to learn while interacting with others” (pp. 43&44). Unfortunately, the author lamented, it cannot be assumed that education managers will be proficient enough to effectively make use of technology for CPD. The authors noted that although elearning brings with it a wonderful new medium to do CPD, it does necessitate that users are relatively computer literate. If they are not, they face the dual challenge of learning how to use the technology and developing the new business competencies, and this is a real challenge for a busy principal, the study concluded.
The TEAM Development Questionnaire developed by Cranston et al. (2011) presented a useful tool determining CPD needs and strategies for use in education management teams. Kiner and Feinstein (2011) constructed a system that developed school leaders using their strengths and thinking processes. “Essentially, this model involves extracting and synthesizing the best from the business world’s strengths based model, combining it with cutting-edge research on the brain, and then uniting the two with educational best practice and research (p. 6). The authors sought to integrate the best of business and educational worlds in school leadership CPD.

Summary

This chapter considered how the literature addressed the conceptual and theoretical framework behind, and the tension between managerial and instructional leadership. The need for the development of business leadership competencies amongst education managers was established. The literature identified the most important business leadership competencies and the review examined some of the more important business leadership competencies in more detail. Finally, the review looked at the possible alternatives for CPD for developing education management business leadership competencies, particularly in a school group.
Chapter 3: Research Methodology

Purpose of the Study

This research was conducted to examine which business leadership competencies were most needed in the context of a South African private school group and how best they could be fostered through continuing professional development. In this South African school group there are corporate investors, the group head office executive, and the senior management teams of the schools. There are no parent-teacher bodies or school governing bodies, which are often led by strong teachers or parents. The South African school group has targeted middle to upper socio-economic income families for its schools. Each school’s subordinate role within the group means that any power struggles amongst the parent and teacher body are subservient to corporate goals.

The South African school group that was the subject of this study is a private organization that has a strong need for business leadership competencies within the education management teams of its schools. As a group, it has the corporate and financial resources to do CPD far cheaper and in a more coordinated manner than individual private schools. As a listed company it has the financial backing of entrepreneurs and corporations to be able to afford expensive CPD.

The South African school group was started in 1998 and listed on the Johannesburg Stock Exchange in 2011 with 6 private schools. Since then, they have acquired various schools to bring the total at the beginning of 2013 to 25 schools. Their projection by 2020 is 40 schools with 45,000 learners, and there has been a recent increase in investment of corporate entities and private individuals (SASG, 2012).
Significance of the Study

Leadership is a very relevant contemporary topic for managers in any organization. The need for leaders to see schools as very specialized forms of business often competes with seeing the school as an instructional institution (Smith, 2010; Schleicher, 2012). In any school there are the continually competing demands of maintaining educational quality and ensuring financial profitability, and this tension is at the center of the business leadership professional development of education managers, which seeks to maintain the integrity of educational excellence within the constraints of tight budgets and high business standards (PwC, 2007). Some of these issues are often subtle and underlying, but they are generating real conflict in top management and negatively filtering down to the rest of the organization (Bush, 2007).

Ethical Considerations

An email was sent to the Chief Operating Officer of the South African school group to request participation in the research. His reply was positive and he expressed his company’s support of the research. The research study was approved in writing by the Chief Operating Officer of the organization.

This research approached the development of business leadership competencies from an anonymous, confidential and team (not a personal and individual) perspective, thus being as non-threatening as possible to individuals within the management team, encouraging honesty, and giving a broader perspective on the issues. All specific results were kept confidential, though the South African school group did not require the signing of any confidentiality agreement. The competencies were listed in the survey in alphabetical order, which made the responses more random and less predictable. This was
a deliberate attempt to avoid prejudicing the respondents, even though many of the competencies are strongly related.

The South African school group has remained anonymous to ensure integrity. To protect the identity of individuals and schools in the South African school group, every letter of the alphabet is coded to correspond to a particular school, with ‘Y’ referring to the pilot study school and ‘Z’ referring to the head office interviewees. The school with the highest number of responses (complete and incomplete) is labeled as school A. Particular responses from that school, which happened to have 9 executive members, were referred to as A1, A2, etc. The number does not refer to any particular rank or position in the organization; it simply reflects the number in the order that it was completed. Head office personnel were referred to as interviewee Z1, Z2, Z3, Z4 and Z5.

Reliability and Validity

Ary (2006) identified credibility, transferability, dependability or trustworthiness, and confirmability. The respondents are academically qualified and experienced professionals, thus the assumption can be reasonably made that they have supplied very dependable data. Comparing qualitative responses from the same school have confirmed that the same patterns emerge, and comparing basic quantitative data (elementary, descriptive statistics not requiring special software) from school to school has shown transferability patterns. A greater response rate, however, would certainly help in making the data more credible.

Research Perspective

The schools currently exist in 8 different provinces in urban cities or large towns.
The group has 4 very different types of schools aimed at various socio-economic markets. The first type is the exclusive, up-market schools that are the flagships of the group. The second type is aimed at the poorer black market. Most of the schools, 19 in total, are the third standard type schools aimed at the upper-middle and upper classes of South African society. The fourth and latest brand to be purchased by the group is an existing up-market pre-school brand. The South African school group’s strategy is to buy existing schools and to start new ones.

The South African school group comprises a fairly wide range of school sizes. In a small school there will typically be 2 or 3 primary subjects: a principal, and his/her 1 or 2 deputies. In a larger school there would be 10 primary subjects: 1 director, 3 principals and 6 deputies. The head office is run by employees that oversee the entire group, currently comprised of 25 schools, and there are currently 81 education managers in these schools.

A ‘School Survey Guide for Heads’ (Appendix A) was compiled and sent to the schools via the group head office in November 2012. Education managers completed the online survey and business managers were interviewed afterwards. The subjects of the survey were school education managers that have come through the ranks of educators to be education managers in the positions of executive heads, operational heads and phase heads. The subjects of the interviews were the business managers, head office administrators and ‘regional heads’ to whom the education managers report, with the interviews based on a summary of the results of the survey. This assisted in a more complete 360 degree appraisal of the wide range of business leadership competencies of the education management teams in the schools within the group.
The primary method of research of this study was an online qualitative survey conducted over 2 months using the http://www.surveymonkey.com website. Data was collected in 4 sections at the survey link.

1. Confidential personal details of the respondent was collected to allow demographic sorting according to team (education or business), school, city and region. The first part allowed respondents to identify themselves in terms of their school and position in the school, not their specific names or job titles, but whether they were education managers (director, principal, or deputy) or business managers (administrator, board member, shareholder or owner), and how many members were in their education management team.

2. Fifty possible business leadership competencies were matched with appropriate team continuous professional development methods, which comprised full-time or part-time study, courses, conferences, seminars, mentoring or coaching, or private reading.

3. The most urgent business leadership competencies for continuous professional development in the education team were prioritized by the respondents.

4. Respondents were requested to give more details of those competencies marked as ‘urgently required’ as part of the qualitative analysis of these competencies and to assist in understanding the given responses. This was an open form producing some interesting and helpful responses. It allowed qualitative responses of the priorities identified in parts two and three.

Since this research instrument had not been used before, it was first piloted in one school and adjusted accordingly before it was used for the rest of the group. This research
hopes to complement the business leadership continuous professional development of education management teams in a particular school group case study in South Africa.

The link to the survey was sent by the South African school group head office to the education managers via the business managers in the group in November 2012. Follow-up was done in the subsequent weeks by the researcher, and business managers sent out reminders to the executive heads. Names of schools were compared to a generic list derived from the South African school group website to make sure that everyone had responded. The data was automatically sorted by the http://www.surveymonkey.com website according to the generic categories in the first section according to the team (education or business), school, city, region and overall, which made the descriptive statistical analysis of patterns much easier. Triangulation between the data from respondents in a particular school showed how consistent the responses were and what the specific needs were for each school, city, region and for the group.

The survey data was compiled and analyzed using the free website tools at http://www.surveymonkey.com in January 2013. A further interview of 4 business managers on 25 January 2013, based on the respective school responses, provided further data for qualitative analysis.

The researcher assumed the role of an anonymous facilitator in the data collection process. While his role was one of surveyor or questioner, he made recommendations to the South African school group for their continuing professional development planning through this dissertation. The researcher compared the results of this research with other research and made several conclusions. Opportunities for further research were explored
and the application of this research to other groups in other groups in different countries is a possibility.

Survey Instrument

As a result of the pilot study from 8 to 22 November, the number of possible competencies was expanded from 35 to 50. A number of contemporary issues were raised at The Commonwealth Council for Education Administration and Management (CCEAM) 2012 conference in Cyprus from 3 – 7 November, at which the proposal was presented, and these were included in the survey. The dissertation chair had previously advised listing up to 100 possible competencies to ensure a greater number of options for respondents, which would have increased the number of variables to provide more accurate data. However, this would have been too great a burden for respondents, would have doubled the time taken to do the survey and would certainly have decreased the responses.

From reviewing the literature, 50 possible business leadership competencies suggested as required for education managers were isolated. The business leadership competencies required by education managers are quite distinctive and this dissertation distilled 50 from the relevant literature. Obviously there are probably many more, but for practical reasons this dissertation has tried to limit the list to the top 50. It has been a difficult task, but the results of the research do indicate that they are comprehensive without being exhaustive. Notably no other competencies were added by any of the research subjects, even though they were given the opportunity to do so.

The 50 competencies are adaptable leadership, administrative leadership, caring and pastoral leadership, change management, charismatic leadership, conflict resolution,
corporate social responsibility (CSR), crisis management, customer relationship management (CRM), decision making, ecological leadership, emotional intelligence (EI) and people skills, empowering subordinates, enterprise resource management (ERM), ethical leadership, event management, financial management, global leadership, human resource management (HRM), innovation and entrepreneurship, inspirational leadership, knowledge management, legal issues, local leadership, motivational leadership, moral leadership, marketing management, organizational political leadership, performance management, project management, public speaking, reflective leadership, safety, health, environment and risk (SHER), servant leadership, shared and distributed leadership, spiritual leadership, steward leadership, strategic leadership, stress management, succession management, sustainable leadership, team leadership, technology leadership, time management, total quality management (TQM), training and development, transformational leadership, values leadership, visionary leadership and writing communication. Respondents were asked to rate these competencies in terms of how urgently they were required by education managers.

Six common possible continuing professional development (CPD) methods were matched to these competencies in a survey.

1. Conference (up to a week and with the entire South African school group)
2. Course (a few days and with regional schools)
3. Seminar (a few hours and with schools in the same city)
4. Mentoring or coaching (of the school education management team)
5. Part-time study (formal education for individuals or the team)
6. Private reading (informal education for the individual or the team)

Respondents were asked: ‘In your opinion, how best can these competencies be developed through continuous professional development? You can choose more than one option.’

Five degrees of urgency were matched to the competencies in the survey: not required; not urgent; can be provided; would be helpful; or urgently required. An open space for any ‘other’ components of these two categories above allowed the respondent to supplement any omission. Finally, a space for open comments allowed the respondents to give more details of one or more of the competencies that were covered. Respondents were asked the question: ‘What are the business leadership continuous professional development priorities of the education management team on the school executive?’ Each competency was rated according to the five-point scale above.

The rest of the Appendices give the data received in the survey. Appendix B has the ‘Survey Statistics Numerical Summary of Responses’. Appendices C and D have a list of the results in table and chart format. Appendix E gives the open response ‘Feedback on Team Professional Development Priorities’ by the education managers.

Interview Questions

A follow-up interview with a sample of 4 head office education managers enabled feedback on specific needs of educational teams to be identified and suitable CPD strategies to be suggested. The education managers have the advantage that they work with all the schools and can see the needs in a more holistic manner. The head office of the school group is located in a major city in South Africa. Interviews were conducted
with 4 business managers based at the head office on 25 January 2013. The 5 questions asked were based on the results of the survey. Each interviewee was given a summary of the results of the survey to study for a few minutes before being asked the questions. The interviewees were given headphones connected to a laptop having Dragon Naturally Speaking Version 12 transcription software installed on it. The software was first trained to learn the regional accent with the first interviewee and then the interviews were conducted. The level of accuracy in recording the interview was astounding, though some minimal correcting was required. The respondents seemed comfortable with this method and were clearly concentrating very hard on enunciating their words clearly.

The five questions posed to the head office business managers were:

1. From your experience in the group, how much of a need do you think there is for the business leadership continuing professional development in education management teams in the South African school group?

2. From your experience in the group, how far would you agree with those business leadership competencies marked high as ‘Urgently required’ in the survey?

3. From your experience in the group, which business leadership priorities that were marked as ‘not required’ in the survey, would you rate as ‘urgently required’?

4. From your experience in the group, which continuing professional development activities do you think are the most appropriate for these ‘urgently required’ competencies?

5. Are there any other business leadership competencies that you would add to the list that are currently not there?
Respondents were given time between questions to compose and refresh themselves before answering the next question.

The data was compiled, minor corrections were made where necessary, and the respondents were allowed to check through their responses to review the accuracy of the record. The data was then backed up on an external hard drive for security.

Summary

This chapter described the research design in this study. The purpose and significance were elucidated, the instruments and design through a survey and interviews outlined, and the research procedure explained.
Chapter 4: Results

The pilot study results helped refine the research tool, the overall comments on the main survey gave the data for the interviews for the head office, and the interviews reinforced the survey data.

The Pilot Study Results

One of the larger schools in the group (school ‘Y’ with 8 executive members) in the largest city in South Africa was deliberately chosen by head office to facilitate the pilot study. Only one executive member did not respond to the survey in a two-week time-frame from 8 to 22 November 2012, but the data was sufficient to proceed with the study. It can be safely assumed that this would be considered a ‘model’ school within the group, as few business leadership competencies were selected as ‘urgently required’, while many were selected as ‘not required’ and most of the comments were significantly positive.

The 10 competencies selected as ‘urgently required’ by only 1 out of 7 respondents (14.3%) were administrative leadership, conflict resolution, empowering and sharing leadership, financial management, human resource management, inspirational leadership, motivational leadership, team leadership, training and development, and visionary leadership.

The 8 competencies selected as ‘not required’ were more decisive. Charismatic and organizational political leadership were selected by 3 out of 7 respondents (42.9%). Change management, corporate social responsibility, moral and values leadership,
servant leadership, spiritual leadership, and steward leadership were selected by 2 out of 7 respondents (28.6%).

The developmental options produced some significant results. Financial management, human resource management and public speaking were selected by 6 respondents (85.7%), and administrative and strategic leadership were selected by 5 respondents (71.4%) for a course. Corporate social responsibility, team leadership, and training and development by 5 respondents (71.4%) were selected for a seminar. Inspirational and spiritual leadership were selected by 5 respondents (71.4%) for mentoring/coaching.

Finally, the open responses at the end of the pilot study were very interesting. Only typographical corrections were made to make the comments readable, otherwise they have not been altered at all.

- Operational head for our high school. The learners need a good leader figure.

- Late information and/or decisions that are made by head office at a late stage, make it difficult for the school’s management to be pro active and to give information through to parents at an early stage of new developments. This results in unnecessary stress on the school’s management and may give the impression that the management team doesn’t plan.

- None.

- I don’t think that we have any urgent matters at the moment.

- Good overview about management competencies.
• The management (especially those at phase head levels) need to be trained and developed in the responsibilities they are given. Financial and human resource management training needs to be given in order to be able to effectively complete tasks such as budgets and staff management.

• Conflict resolution: How to handle people with difficult emotional problems that causes conflict between staff and management.

In summary, one respondent felt that head office did not give them sufficient notice for requests to be fulfilled, one respondent felt that a high school operational head was considered required for the school, one respondent felt that the training of phase heads was urgent, and one respondent felt that conflict resolution was a particularly required competency.

Overall Comments on the Main Survey

The survey guide was sent by head office to all the executive heads of all the schools a few days after the pilot study was completed. Heads were not compelled to respond at all, simply requested by head office to ask their executive team to complete the survey for an independent researcher. A total of 13 out of 25 schools responded, thus a 52% overall organizational response rate. Of the 13 schools, 6 completed only one response each, presumably the executive heads themselves acting as ‘gatekeepers’. A total of 35 out of a possible 80 heads responded, a 44% individual response rate. Out of the 35 responses, 7 were incomplete and 28 were fully completed, thus 80% of the total respondents. However, the incomplete respondents completed the survey to varying degrees, thus their responses were counted, as they still contained relevant and useful data.
The Results of the Competencies Selected by Respondents

The Top 6 ‘Urgently Required’ Competencies

The competency that received the highest ‘urgently required’ rating was conflict resolution with 8 responses calculating to 27.6%. Interestingly enough it received the same responses and rating as the second highest ‘would be helpful’ and third highest ‘can be provided’ competency. Only 4 respondents rated it as ‘not urgent’ at 13.8% and 1 as ‘not required’ at 3.4%. This competency received nearly 7% more than its three nearest competencies, suggesting that it is a significant business competency that the heads feel that they need to be developed in the executive team. Crisis management was separately specified as a competency, but only rated as ‘urgently required’ by 4 respondents (13.8%) in the survey.

The 3 competencies that received the next highest rating by respondents were customer relationship management (CRM), motivational leadership and financial management, from 6 respondents at 20.7% of the total.

The next 2 competencies rated as ‘urgently required’ were change management, and safety, health, environment and risk (SHER) with 5 responses at 17.9%. The rapid growth and changes in the group have brought about the significant need for change management as a business leadership competency. Indirectly related to this is the large amount expansion building that is going on at the schools, thus producing real SHER concerns.

The business managers at head office concurred that these competencies were, indeed, ‘urgently required’. However, they were astounded at some of the responses to
the competencies that the education managers rated as ‘not required’ and felt that some of them were actually ‘urgently required’. They felt that the education managers did not understand the South African group’s business requirements of private school leadership well enough. They gave a number of reasons for some of these competencies to be considered priorities in continuing professional development.

The Top 4 ‘Would Be Helpful’ Competencies

The competency that interestingly received the highest rating in the ‘would be helpful’ category was sustainable leadership with 15 respondents at 51.7%. However, strangely only 1 respondent at 3.4% rated it as urgently required, giving a total of 55.1% from 16 respondents. Comparatively, financial management surprisingly only had a combined response of 48.3% from 14 respondents, 20.7% from 6 respondents in the ‘urgently required’ category and 27.6% from 8 respondents in the ‘would be helpful’ category.

The competency that received the second highest rating in the ‘would be helpful’ category was stress management with 48.3% by 14 respondents. This is a higher percentage (nearly double) than conflict resolution with 8 responses calculating to 27.6% in the ‘urgently required. There is an obvious connection, as stress causes conflict, and conversely conflict causes stress. In fact, if taking both the ‘urgently required’ and ‘would be helpful’ categories together, conflict resolution had a total of 16 responses at 55.2%, whereas stress management had 19 responses at 65.5%. The line between these two categories is very fine and more respondents may have changed this weighting significantly.
The competencies that received the third highest rating in the ‘would be helpful’ category were technology leadership and empowering subordinates from 12 respondents at 42.9%. Once again, we have an equal share between a more ‘technical’ competency and a management ‘soft skill’. Surprisingly both also had a 10.7% rating from 3 respondents as ‘urgently required’, with a combined rating of 53.6% from 15 respondents in both categories.

The Top 13 Combined Competencies

The top 13 combined ‘urgently required’ and ‘would be helpful’ competencies were:

1. Stress management from 19 respondents (65.5%).
2. Conflict resolution and sustainable leadership from 16 respondents (55.2%).
3. Technology leadership and empowering subordinates from 15 respondents (53.6%).
4. Performance management and decision-making from 15 respondents (51.7%).
5. Financial management, administrative leadership, customer relationship management, visionary leadership and innovation and entrepreneurship from 14 respondents (48.3%).

It is more realistic to combine these top two categories to give a more accurate reflection of the competency priorities, as they are very similar and indicate a real need in competencies. Combining them gives more data to work with and so would likely be more accurate. It also helps us to polarize all the data into either ‘necessary’ or ‘unnecessary’ competencies.
The Top 6 ‘Not Required’ Competencies

The three highest rated ‘not required’ competencies reflected in the survey were surprisingly:

1. Public speaking – 11 responses (37.9%).
2. Organizational political leadership – 9 responses (31%).
3. Spiritual leadership – 6 responses (21.4%).

The responses of all the head office business managers were unequivocally that of surprise and amazement. They insisted that these three competencies were extremely important to the group and ‘urgently required’ by the heads. The implication was that the education managers considered themselves competent at public speaking, could deal effectively with organizational political leadership requirements and were effective at spiritual leadership, but that the business managers did not agree. It is possible, as one of the business managers pointed out, that education managers did not fully understand the meaning of the term ‘organizational political leadership’, which means that they could not respond affirmatively. This is very possible, but they also agreed that this competency was very poorly practiced, even when it was clearly understood. As an education group with a distinctively Christian ethos, spiritual leadership was a very important competency, but the business managers felt that is was poorly understood and practiced by the education managers.

The next three competencies rated highly as ‘not required’ were charismatic, global and values leadership, rated as such by 6 heads at 20.7% each. Once again, these were competencies that were clearly seen by the heads as unimportant, but the business
managers vociferously disagreed. Charismatic leadership was not highly regarded by the heads in the questionnaire, but they were considered important by the education managers in the interviews. The need for heads to have a global leadership vision is considered crucial by the group, but few heads have international experience and fewer seem to see its importance. Values are strongly linked to spiritual principles, and it would appear that though these are extremely important to the group and parents, heads do not see this. The South African school group is overtly Christian in its ethos, and it considers good values and spiritual principles to be very important for its leaders.

The Results of the CPD Methods Selected by Respondents

The CPD Mechanism of the Top 6 Competencies

Some very interesting patterns occur in the survey section on ‘Business Leadership Competencies Professional Development Activities’. They provide further data to support that which was observed in the section identifying the competency priorities.

The highest ranking competency was financial management with 22 heads at 68.8% (more than two-thirds) selecting it in the form of a course (defined as a few days professional development with heads in the same region). Financial management also ranked as the second highest ‘urgently required’ competency after conflict resolution, but conflict resolution was only in third place selected by 15 heads at 46.9% in the form of a course. It is significant, however, that these two competencies are flagged from both angles in the top three rankings.
The second highest ranking competency was administrative leadership, selected by 20 heads at 62.5%, also in the form of a course. This competency is very strongly linked to financial management, and, in fact, the two overlap quite significantly. It is interesting that the top two competencies chosen are both selected as courses.

The third highest ranking competencies selected by 19 heads at 46.9% also as a course were conflict resolution, crisis management, emotional intelligence and people competencies, and legal issues. Crisis management is affirmed by Smith and Riley (2010) as one of the most important competencies. Emotional intelligence and people competencies are mentioned by the business leaders as significantly deficient, and this competency is directly related to effective conflict resolution. Legal issues are dealt with by the group head office.

What is most significant amongst these 6 top competencies is that they were all selected as courses by the heads. A course is defined for the heads as lasting usually a few days and done with regional schools. The implication seems to be that they are looking for a substantial amount of development in these areas with a broader range of involvement, not just a seminar usually lasting only a few hours, and with schools not only in the same city. This kind of CPD would have to be done during the vacation period, probably the week before school starts during a longer holiday.

Other significant competencies selected as courses were SHER at 53.1%, technology leadership at 51.6%, team leadership and project management at 50%, and stress management at 43.8%. Private reading was rated by 60% for steward leadership, 56.3% for spiritual leadership, and 53.1% for charismatic and values leadership.
Mentoring/coaching was rated by 53.1% for caring and pastoral leadership, 51.6% for empowering subordinates, and 50% for moral leadership.

Feedback on Team Professional Development Priorities

All 7 incomplete surveys did not make any comments, as could be expected. Only 6 respondents had no particular comment in this section of the survey. There were 4 comments on stress management, two of which came from the same school, and two marking it as ‘urgently required’, not from the same school. However, only 5 respondents marked stress management as ‘urgently required’ at 17.25% of the total. There were 3 that commented on the importance of information technology training, particularly for managers. However, technology leadership only received 3 ‘urgently required’ responses at 10.71% of the total, but not all were those who specifically commented about it in the ‘open comments’ section, and all 3 were from different schools. Performance management was mentioned by 3 respondents from different schools in the comments, but only 5 respondents (17.25%) selected it a ‘urgently required’, which does not make it a significant issue. There were only 2 comments on financial management, both of which marked it as ‘urgently required’ and respondents were from different schools. Only 2 mentioned HR, training and TQM in separate comments. Conflict management, CRM, succession management, team leadership, time management, empowering subordinates, and health and safety were mentioned only once.

The correlation between the overall competency statistics and comments shows little consistency. Financial management was mentioned amongst the others, but perhaps it is more difficult to comment on it than most of the other competencies. Conflict management was only mentioned once in the comments in passing, yet it was rated
highest overall. Perhaps this issue is self-explanatory and does not require much comment. Overall, the comments did not show much of a pattern and could certainly not be described as helpful in explaining the descriptive statistics.

An Integrated Analysis of Specific Schools, Cities and Regions

An Analysis of Specific Schools

School A is one of the largest in the whole group and it gave one of the best responses out of all the schools. Out of the 8 executive members, all 8 responded, 6 completing the survey fully and 2 partially completing the survey. The highest ratings of ‘urgently required’ at 33.33% were conflict resolution, financial management, HRM and performance management. Stress management received a significant 83.33% rating as ‘would be helpful’. The ‘not required’ ratings were left completely blank. The developmental mechanisms rated as 85.71% and suggested as a course were: administrative leadership, crisis management, and emotional intelligence and people skills. No other descriptive statistics are noteworthy and there were no patterns of consistency in the comments. This was the only school in the city and region that responded, so a comparative analysis cannot be done.

School B is a medium-size school and all 5 executive members responded by completing the survey. The highest rating of ‘urgently required’ was indicated as empowering subordinates and the highest rating of ‘not required’ was organizational political leadership, both at 40%. Stress management received a large 83.33% rating as ‘would be helpful’, like school A. Two of the comments also emphasized the need for stress relief. It would appear as though stress is a major factor at these schools. Two patterns emerged with 80% of respondents for the developmental mechanisms. First, they
chose a seminar for empowering subordinates, innovation and entrepreneurship, marketing management, and sustainable leadership. Second, they chose private reading for caring and pastoral leadership, servant leadership, shared and distributed leadership, and spiritual and steward leadership.

School C completed 4 out of 4 possible responses. Listed under ‘would be helpful’ were technology leadership (75%) and adaptable leadership (50%). Listed as ‘not required’ at 75% were OPL, public speaking and values leadership. Private reading as a developmental mechanism was identified by 100% of respondents for charismatic leadership, conflict resolution, conflict management, and local leadership. There were no notable comments.

School D gave 3 out of 7 responses, with 2 incomplete and 1 complete. This is insufficient data from which to draw any notable conclusions.

School E had 3 completed responses out of a possible 6. No ‘urgently required’ issues stand out, but 2 out of 3 (66.67%) indicated that administrative leadership, empowering subordinates, motivational leadership, and performance management ‘would be helpful’. Under ‘not required’ at 66.67% were listed charismatic leadership, global leadership, OPL, and transformational leadership. Public speaking received 100%. One of the comments is so significant that it is worth quoting verbatim, with minor typographical corrections.

Work under extreme stress. Issues not resolved. No democratic decision making - autocratic. Have to resolve conflict each day. Must take pride in your work - customer relationship can be better. More innovation and entrepreneurship
strategies to teach students. Morale is down - need ethical and empowering leadership to pick up the team (respondent 2).

This respondent was extremely negative about the situation at the school and mentioned the perceived problem of ‘autocratic’ leadership. The innovation and entrepreneurship competency was applied as an enhancement to the education process, not management.

School F gave 2 complete responses out of a possible 8. The only agreement here was that ecological leadership was ‘not required’ and reflective leadership ‘not urgent’. Most of the developmental mechanisms were identified as mentoring and coaching. There were no comments.

An Analysis of Specific Cities

Only one city had responses from more than one school. These two schools had a combined total of 7 out of a possible 11 responses, with 2 incomplete, thus giving 5 complete responses. The only significant responses were that 3 identified technology leadership as ‘would be helpful’. It is interesting that this part of the country is considered ‘behind’ the more ‘advanced’ parts of the country. The developmental responses most significant at 85.71% with 6 responses were mentoring/coaching for adaptable leadership, charismatic leadership, and values leadership. There were no significant comments.

An Analysis of Specific Regions

A full 14 out of the 35 respondents were from one region, with only 1 incomplete response. Stress management, and training and development, were rated as ‘urgently required’ by 4 out of 13 by 30.77% respondents. Rated as ‘would be helpful’ was
sustainable leadership by 8 out of 13 respondents at 61.54%, as well as performance management and team leadership at 53.85% by 7 out of 13 respondents. Rated as ‘not required’ by 6 out of 13 respondents at 46.15% of the total were OPL and public speaking. There were no significant comments.

Another region worth noting had 5 out of 35 respondents, though 2 were incomplete, thus leaving only 3 complete responses. Conflict resolution, TQM and performance management were listed as ‘urgently required’ by 2 out of 3 respondents at 66.67%. Private reading was the most popular development mechanism, with several 100% agreements. Crisis management was mentioned by 2 out of 3 respondents in their comments.

The Interviews with Head Office Business Managers

The head office of the school group is located in a major city in South Africa. Interviews were conducted with 4 business managers based at the head office on 25 January 2013. The 5 questions asked were based on the results of the survey. Each interviewee was given a summary of the results of the survey to study for a few minutes before being asked the questions. The interviewees were given headphones connected to a laptop having Dragon Naturally Speaking Version 12 transcription software installed on it. The software was first trained to learn the regional accent with the first interviewee and then the interviews were conducted. The level of accuracy in recording the interview was astounding, though some minimal correcting was required.

There was a definite consensus amongst the 4 interviewees about most issues, though each one did emphasize a few different things.
1. From your experience in the group, how much of a need do you think there is for the business leadership continuing professional development in education management teams in the South African school group?

Interviewee 1 emphasized that as a listed company it was very important that its leaders were equipped to lead the business. The interviewee indicated that most of these come from the state school system and do not necessarily have experience in the private sector. The interviewee stressed the importance of synergy between the education and business fields and felt that the current levels of business leadership skills amongst the leaders were not up to standard.

Interviewee 2 described it as “absolutely essential” that staff continually need to be developed with the consolidation of a lot of schools into one group. There is currently little investment in staff in the area of education and the group is already focusing on the continuing professional development of their staff.

Interviewee 3 concurred that as a private group it needs to work according to a business plan, and because business is changing all the time continual training is needed. The interviewee emphasized the need for management teams in the schools to think of how they can continually improve the business.

Interviewee 4 stressed the “huge need for development” in this area and that many school leaders had a “delusion of knowledge”, but that business leadership skills were “sorely lacking”.

2. From your experience in the group, how far would you agree with those business leadership competencies marked high as ‘Urgently required’ in the survey?
Interviewee 1 agreed with change management, conflict resolution, customer relationship management, financial management, motivational leadership, performance management, stress management, training and development, and safety, health, environment, and risk.

Interviewee 2 named financial management, emotional intelligence and people skills, change management, and conflict resolution.

Interviewee 3 identified change management, conflict resolution, customer relationship management, organizational political leadership, financial management, inspirational leadership, performance management, stress management, time management, training and development, visionary leadership, and safety, health, environment, and risk.

Interviewee 4 highlighted change management, conflict resolution, financial management, and stress management, emphasizing that leaders lack a correct “understanding of the real difference between leadership and management” and organizational political leadership.

3. From your experience in the group, which business leadership priorities that were marked as ‘not required’ in the survey, would you rate as ‘urgently required’?

Interviewee 1 named administrative leadership, charismatic leadership, moral leadership, spiritual leadership, values leadership, public speaking, organizational political leadership, steward leadership, and transformational leadership.

Interviewee 2 identified public speaking, transformational leadership, and values leadership.
Interviewee 3 listed administrative leadership, charismatic leadership, ethical leadership, global leadership, moral leadership, public speaking, spiritual leadership, transformational leadership, and values leadership.

Interviewee 4 emphasized charismatic leadership, local leadership, moral leadership, organizational political leadership, public speaking, and spiritual leadership.

4. From your experience in the group, which continuing professional development activities do you think are the most appropriate for these ‘urgently required’ competencies?

Interviewee 1 suggested an adaptable leadership course or seminar once in two years for existing and potential leaders, administrative leadership seminars every three years, a change management conference as soon as possible, personal reading for leaders on charismatic leadership, and an annual seminar on conflict resolution with emotional intelligence and people skills (this connection being made by several respondents in the survey). The interviewee further suggested an annual conference integrating ethical, spiritual, moral and spiritual leadership. Other suggestions included a lengthy financial management course, HRM, an inspirational leadership course or seminar, marketing management, a once-off public speaking seminar, an annual strategic leadership course, a time management course, TQM, transformational, and visionary leadership, and a course in writing communication (considered insignificant by the education managers).

Interviewee 2 proposed that competencies like technological and spiritual leadership could be developed through conferences in the holidays, but implied that a shorter course of a few days, as well as mentoring and coaching could be just as effective.
Interviewee 3 identified financial management through mentoring and courses, as well as change management, HRM, and emotional intelligence and people skills through seminars.

Interviewee 4 felt that mentoring and coaching were good routes for personalized development, but needed the right people; that conferences were a good way to develop a sense of the “community of practice”, but that they often put people in the “holiday mode”, and that seminars, courses and part-time study had their place.

5. Are there any other business leadership competencies that you would add to the list that are currently not there?

After reviewing the list of competencies in the results none of the interviewees added anything else to the list. They felt that the list comprehensively covered all the business leadership competencies required by education managers in their South African school group.

The top 14 competencies mentioned by the business managers were financial management (4/4), change management (4/4), conflict resolution (4/4), stress management (3/4), CRM (2/4), performance management (2/4), safety, health, environment and risk (2/4), organizational political leadership (2/4), emotional intelligence & people skills (1/4), inspirational leadership (1/4), time management (1/4), training and development (1/4), motivational leadership (1/4), and values leadership (1/4). This was almost identical to the list derived statistically from the survey data of the combined top 13 competencies that were both ‘urgently required’ and ‘would be helpful’. This confirms the reliability and trustworthiness of both the interview and survey respondents and data.
A Comparison of the Survey with the Interviews

Comparing the two sets of data from the surveys and the interviews shows some interesting and notable patterns. There are 5 competencies that the two sets have in common: stress management (22), conflict resolution (20), financial management (18), performance management (17), and customer relationship management (16).

Table 4.1 below compares these results. The number in brackets indicates the number of respondents for each competency in the survey and interviews.

Table 4.1.

A Comparison between the Survey and Interview Priorities

<table>
<thead>
<tr>
<th>Education managers (survey responses)</th>
<th>Business managers (interview responses)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stress management (19)</td>
<td>Stress management (3)</td>
</tr>
<tr>
<td>Conflict resolution (16)</td>
<td>Conflict resolution (4)</td>
</tr>
<tr>
<td>Sustainable leadership (16)</td>
<td>Values leadership (1)</td>
</tr>
<tr>
<td>Performance management (15)</td>
<td>Performance management (2)</td>
</tr>
<tr>
<td>Technology leadership (15)</td>
<td>Motivational leadership (1)</td>
</tr>
<tr>
<td>Empowering subordinates (15)</td>
<td>Training and development (1)</td>
</tr>
<tr>
<td>Decision-making (15)</td>
<td>Time management (1)</td>
</tr>
<tr>
<td>Technology leadership (15)</td>
<td>Organizational political leadership (2)</td>
</tr>
<tr>
<td>Customer relationship management (14)</td>
<td>Customer relationship management (2)</td>
</tr>
<tr>
<td>Financial management (14)</td>
<td>Financial management (4)</td>
</tr>
<tr>
<td>Visionary leadership (14)</td>
<td>Emotional intelligence &amp; people skills (1)</td>
</tr>
<tr>
<td>Administrative leadership (14)</td>
<td>Change management (4)</td>
</tr>
<tr>
<td>Innovation and entrepreneurship (14)</td>
<td>Inspirational leadership (1)</td>
</tr>
<tr>
<td>Safety, health, environment and risk (2)</td>
<td></td>
</tr>
</tbody>
</table>
These top five competencies are in the top ten for both sets. The fact that both groups of respondents mentioned these in the survey and interviews is certainly significant.

The business managers in the interview felt that public speaking, charismatic leadership, moral leadership, spiritual leadership, values leadership and organizational political leadership should have been marked as ‘urgently required’ by the education managers.

Research Question Analysis

There were two pairs of central research questions that this dissertation sought to answer.

1. Identifying the priorities of required business leadership competencies.
   a. What are the most important business leadership competencies that are required by private school managers in their jobs?

   The literature review distilled 50 of the most important business leadership competencies, though more than 100 could probably be listed. These competencies were presented in a survey in alphabetical order to ensure that respondents were not prejudiced, though many of the competencies were similar.

   b. Which of these business competencies need the most development in this particular education group and with specific school management teams?

   The top 5 rated competencies from the combined scores of education managers in the survey and business managers in the interviews were stress management, conflict
resolution, financial management, performance management, and customer relationship management. Business managers added the importance of a number of competencies that the education managers did not think were necessary. The difference in perspective between these two groups is significant.

Financial management and conflict resolution appear in the top three of both competency and developmental priorities. They are, by nature, very different, but also extremely crucial competencies. Financial management is very much quantitative and deals with the ‘bottom line’. Conflict resolution is strongly qualitative and deals with people. If either of them is not handled correctly, then they can produce disastrous results.

2. Formulating a strategy for developing these 50 business leadership competencies.

a. How effectively have managers been equipped for business leadership through their past education, training and development?

It has become clear through the survey and interviews that there are big ‘gaps’ in the business leadership competencies of the education managers, so we can safely assume that their past education, training and development has lacked efficacy in these specific areas.

b. How can these competencies be most effectively developed in the future?

Most of the education managers chose a course (usually a few days and with regional schools) for the most appropriate CPD method for most of the competencies. A national conference is expensive, but can be done occasionally, especially with top
management, as the business managers suggested. A seminar for a few hours with individual schools can be used for specific competencies that are lacking in particular school education management teams. Personal reading, and coaching and mentoring can be ongoing.

Summary

This chapter reported the pilot study survey results and detailed the adjustments made to the survey instrument. It gave overall comments on the main survey, specifying the top 6 ‘urgently required’, the top 4 ‘would be helpful’, top 13 combined and the top 6 ‘not required’ competencies. It compared the survey and interview results, which showed similar patterns. It also named the appropriate developmental mechanism of the top 6 competencies, and considered the feedback on team professional development priorities. It gave an analysis of specific schools, cities and regions and the patterns that emerged at each of these levels. It reported on and analyzed the interviews with head office business managers. Finally it gave an analysis of the consistent correlation of the results with the research questions.
Chapter 5: Discussion

This research has shown that education managers in the South African school group struggle to simultaneously manage the business and educational sides of the school. They often feel that they are running a business more than they are educating children, and this often produces feelings of frustration, particularly when they have been adequately prepared for the instructional leadership but not necessarily the business leadership requirements of the job. Working in a school group complicates the business leadership competencies to adapt to the private school structure.

This dissertation focused on the business leadership competencies that are required to manage schools in this South African school group without denying the need for effective instructional leadership. However, with a list of 50 competencies it is difficult to define exactly how these competencies should be approached for the continuing professional development (CPD) of education managers. These competencies were certainly significant in themselves, but the research showed certain patterns develop.

In reviewing the survey responses and interviews in the South African school group it became clear that these competencies cannot simply be seen in isolation, but that many are strongly connected and can be ‘clustered’ together. These ‘clusters’ make it easier to analyze and assign these business leadership competencies to CPD activities. The competencies have been grouped into 7 categories (conveniently 7 P’s) as process, public, people, pastoral, personal, problem and proactive competencies. The suggested
CPD methods for each competency were compiled for each section and the patterns discussed.

‘Clusters’ of Competencies

1. Process Competencies – Getting Things Done

The largest ‘cluster’ is that of 14 more ‘mechanical’ or ‘technical’ competencies. These have to do with business ‘processes’ rather than ‘people’. These are administrative leadership, decision making, enterprise resource management (ERM), event management, financial management, knowledge management, project management, legal issues, steward leadership, strategic leadership, technology leadership, time management, total quality management (TQM), and writing communication. They represent the ‘functional’ side of the business.

These can be further conveniently grouped according to the allocated time period whether they are long-term (over a few years), medium term (a year cycle) and short-term (weeks or months). This division can enable a better planning for the CPD of education managers.

Long-term processes must begin with strategic leadership based on the principle of steward leadership (taking care of what has been entrusted to you), total quality management (TQM) (ensuring that the best educational quality is always maintained), enterprise resource management (ERM), knowledge management, and technology leadership. These are competencies required for long-term education management over several years.
Medium-term processes include financial management, event management, project management, and legal issues. These cover competencies required on an annual cycle over the school year.

Short-term processes are the tactical and operational competencies of administrative leadership, writing communication, decision making and time management. These are day-to-day competencies that education managers require in the execution of their routine duties. Table 5.1 below shows the relationships between the ‘process’ competencies in terms of their time frames.

Table 5.1.

Process Competencies – Getting Things Done

<table>
<thead>
<tr>
<th>a. Long-term</th>
<th>b. Medium-term</th>
<th>c. Short-term</th>
</tr>
</thead>
<tbody>
<tr>
<td>(over a few years)</td>
<td>(a school year cycle)</td>
<td>(term/semester)</td>
</tr>
<tr>
<td>Strategic leadership</td>
<td>Financial management</td>
<td>Administrative leadership</td>
</tr>
<tr>
<td>Steward leadership</td>
<td>Event management</td>
<td>Writing communication</td>
</tr>
<tr>
<td>Total quality management</td>
<td>Project management</td>
<td>Decision making</td>
</tr>
<tr>
<td>Enterprise resource management</td>
<td>Legal issues</td>
<td>Time management</td>
</tr>
<tr>
<td>Knowledge management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technology leadership</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

a. Long-term (over a few years).

i. Strategic leadership.

Strategic leadership is a high-level business competency that is usually taught late in the business school curriculum, as it incorporates so many of the other subjects that are
foundational to a good set of business competencies (Davies, 2011). Strategic leadership is the over-arching competency that integrates the vision and mission of an organization with its operational function to ensure long-term prosperity (Eacott, 2007). Individual schools in the group need very clear direction from head office as to what the strategic direction of the group is before the education management team can set a clear course of strategy for its school. From the responses to the survey, there is some indication that greater clarity is required, and that national conferences could be used to ensure this, as suggested by the business managers.

ii. **Steward leadership.**

Steward leadership is an overarching competency including financial and ERM specifically based on a philosophy of accountability to God and shareholders (Rodin, 2010).

iii. **Total quality management (TQM).**

TQM goes beyond simply competent management and strives for organizational excellence in all products and processes (Sallis, 2002).

iv. **Enterprise resource management (ERM).**

In schools ERM is just as important as in business, but also poses challenges (Dahar et al., 2010)

v. **Knowledge management (KM).**

Schools, in a sense, are very specialized types of businesses, and like all businesses they are involved in KM. However, most other businesses indirectly manage knowledge as part of their business processes, whereas educational institutions are
directly involved in KM with their consumers, the students. This competency is very strongly linked to technology leadership, as this is how modern knowledge is managed (Bizzell, 2011).

vi. Technology leadership.

In our modern era, the place of technology in education has taken center-stage and a clear strategy of technology acquisition, management and upgrading should be formulated, ideally according to a 3-year cycle to ensure keeping up-to-date with the latest technological developments. But to be technology leaders many education managers will need to spend a lot more time learning how to master technology themselves and being able to understand which technology is most appropriate for their schools. Of course, they also have to get over their own technophobia, which is very prevalent amongst the older generation of education managers. In a sense, this is a ‘Catch-22’ situation because the best medium for business leadership competency (including technology leadership) CPD is technology, but for many their fears and incompetence in this area are preventing them from accessing this medium (Bizzell, 2011).

vii. Discussion

Enterprise resource management (ERM) was rated at 41.4% by 12 respondents as ‘can be provided’ and at 40.6% by 13 respondents for a course. Knowledge management was rated at 37.9% by 11 respondents as ‘can be provided’ and at 53.1% by 17 respondents for a seminar. Steward leadership was rated at 41.4% by 12 respondents as ‘can be provided’ and at 60% by 18 respondents for private reading. Strategic leadership was rated at 46.4% by 13 respondents as ‘can be provided’ and at 35.5% by 11
respondents for a course, private reading and mentoring/coaching. Technology leadership was rated at 42.9% by 12 respondents as ‘would be helpful’ and at 51.6% by 16 respondents for a course. Total quality management (TQM) was rated at 31% by 9 respondents as both ‘would be helpful’ and ‘can be provided’, and at 48.4% by 15 respondents for a course. Nearly half of all respondents see the need for all these long-term ‘process’ skills as ‘can be provided’, mostly preferring a course with regional schools over a few days as the CPD method.

b. Medium-term (a school year cycle).

i. Financial management (FM).

FM is usually part of the long-term strategic planning of an organization, but in the South African school group this is largely controlled by the head office. Income statements and balance sheets are covered by the school bursars and accounting staff. What is left for education managers in the school is medium-term annual planning for each school year cycle. The primary activity in this respect is budget control, and it is very strongly linked to the concept of steward leadership (Kerr, 2011). Financial management is a competency that is commonly referred to in the literature as a required competency (Mumford et al., 2007). Smith and Riley (2010) indicate that “There are many school leaders who feel…more than a little concerned (perhaps even scared) about dealing with the school’s finances” (p. 14). This fear can be overcome by effective CPD.

ii. Legal issues.

Legal issues are usually referred to head office who will deal with them in conjunction with the operational head. Most of these issues will probably take a few
months to resolve, though a few may extend beyond that. The most common legal issues would be labor disputes of dismissed employees, which can usually be resolved within 6 months. The school may need to take legal action against debtors, but the amounts involved would usually be less than the legal fees required. The more serious legal issues would usually originate from disaffected parents as a result of physical injuries or sexual abuse.

iii. **Event and Project management.**

Most events or projects would hardly last for more than a year, except the long-term building plans of the school, which would largely be controlled by head office. Events are often cyclic and likely to last no more than a few days, and projects are once-off, lasting only weeks or months.

iv. **Discussion**

Event management was rated at 34.5% by 10 respondents as both ‘not urgent’ and ‘can be provided’ and at 37.5% by 12 respondents for both a course and a seminar. Financial management was rated at 20.7% by 6 respondents as ‘urgently required’ and at 68.8% by 22 respondents for a course. Legal issues was rated at 37.9% by 11 respondents as ‘can be provided’ and at 59.4% by 19 respondents for a course. Project management was rated at 32.1% by 9 respondents as ‘can be provided’ and at 50% by 16 respondents for a course.

Financial management certainly stood out from the other competencies in this group, as more than one in five considered it to be ‘urgently required’. The South African school group needs to focus on budget control as a major priority for CPD. The other
competencies were selected by about a third of respondents as ‘can be provided’. All competencies were identified for a course over a few days with regional schools over a few days as the appropriate CPD method.

c. Short-term (weeks and months).

i. Administrative leadership.

Administrative leadership is a very general term and strongly linked to the competency of strategic leadership. A good strategy can make administration simple and easy, but a bad strategy can create a bureaucratic nightmare by creating unnecessary paperwork. The balance is often hard to find.

ii. Writing communication.

Writing communication is an obvious competency for leaders, but most education managers seem not to consider it very important. One business manager mentioned it as a developmental need. Many education managers are not English first language speakers, and this comes through very clearly in the comments. Good written communication gives the impression of professionalism.

iii. Decision making.

Decision making is a difficult competency to develop and relies on the experience that education managers have had in their careers as educators (Mpungose, 1999; Johnson & Kruse, 2009; Smith, 2010).

iv. Time management.

Time management is a difficult competency to develop, as education managers can schedule their time effectively and then summarily have it thrown into disarray by
unplanned crises. However, this skill is a difficult one to teach and is strongly connected to certain personality types.

v. Discussion

Administrative leadership was also rated at 37.9% by 11 respondents as ‘would be helpful’ and at 62.5% by 20 respondents for a course. Decision making was rated at 37.9% by 11 respondents as ‘would be helpful’ and at 43.8% by 14 respondents for both a course and a seminar. Time management was rated at 31% by 9 respondents as ‘would be helpful’ and at 46.9% by 15 respondents for a course. Writing communication was rated at 31% by 9 respondents as ‘can be provided’ and ‘not urgent’ and at 40.6% by respondents for a course and seminar. Most of these short-term ‘process’ competencies have been identified as ‘would be helpful’ by about a third of respondents for a course or seminar. The South African school group needs to make it very clear to the schools how they want things done.

2. Public Competencies – The Face of Leadership

The next ‘cluster’ of 10 is the more ‘public’ or ‘glamorous’ group of competencies. They are charismatic leadership, emotional intelligence (EI) and people skills, global and local leadership, inspirational leadership, marketing management, motivational leadership, organizational political leadership, public speaking, and visionary leadership.

a. Levels of public competencies.

There are different levels of public leadership competencies. Global leadership, local leadership, marketing management and organizational political leadership are public competencies on the international, regional, community, and institutional levels. Global
leadership is having a global vision for education. Local leadership is having a regional concern for education. Marketing management is essentially promoting the school in the immediate community. Organizational political leadership is the ability to implement and utilize the organization’s image to benefit it. This can be illustrated by a continuum of public leadership competencies as seen in table 5.2.1 below.

Table 5.2.1.

*Levels of Public Competencies*

<table>
<thead>
<tr>
<th>Global</th>
<th>Local</th>
<th>Marketing</th>
<th>Organizational political leadership</th>
</tr>
</thead>
<tbody>
<tr>
<td>International</td>
<td>Regional</td>
<td>Community</td>
<td>Institutional</td>
</tr>
</tbody>
</table>

Education leaders must gain a global view of education and learn from other contexts. The popular term ‘glocal’ reflects the union of this international perspective with a regional application of its lessons. We should think ‘global’ and act ‘local’. Too many educators are caught in their ‘local’ way of doing things and cannot adapt to a changing world. Keeping up with what is happening all over the world is the only way that they can remain relevant to their community and ensure that their institution is effectively marketed as a better choice than others in the area (Day & Leithwood, 2007).

Buscher (2006) showed that organizational political leadership needs a lot more attention from educational researchers and managers alike. It plays a far more important role in education management than many would want to acknowledge, and it is hardly ever discussed at an operational level. It is important that we do not try to artificially compartmentalize the organizational and political issues that face education managers, but rather identify which areas they affect, and deal with them accordingly. Politics
affects every area of our lives, both public and private, from national to family issues, yet few people recognize this in the school environment. Good OPL can make a significant difference in any local school and especially in a South African school group. The author examined the “political model” as “an alternative critical perspective” in “making sense of schools as organizations” (p. 7). He focused on the “distribution of power in institutions and societies and how this is used” and emphasized that “Power is more accessible to people in more senior posts in a school hierarchy” (p. 7). According to the author, organizational political leadership (OPL) is one of the least understood competencies in the educational field. He explained how this OPL is worked out in practice in the school. In an education group the need for OPL is magnified, as the corporate ethos becomes preeminent in establishing a political framework for the individual school. The “external stakeholders” include the organization’s shareholders, parents and government, and sometimes the “internal actors” make use of the “external actors” to get things done (p. 28). The author concluded his concerns of how this OPL affects every facet of the educational institution. He lamented that so little attention has been paid to it in the academic literature. The fact that it has remained “uncharted territory is more a comment on the conceptual frameworks that researchers have brought to their attempts to understand the management of schools as organizations, than of the lived realities that staff and students experience on a daily basis” (p. 57).

Whether we like it or not, every organization has politics, and it is crucial that leaders develop OPL as a relevant competency in the global, local and community educational context. A regional cluster of schools doing a course together will be able to ensure the integrity of the ‘glocal’ approach (Green, 2009).
b. Types of public competencies.

Visionary leadership is the start to public credibility. A leader with no vision taking a leadership position immediately loses credibility. Charismatic leadership incorporates visionary leadership but adds special gifts and abilities associated with oratory, extroversion and a vibrant personality. Public speaking or oratory skills include the ability to verbalize and express that vision. Very often this is done through ‘reflective storytelling’ (Brill, 2008). Many leaders have an introverted nature and do not see the need for extroversion, but charismatic leadership is perceived by the public as good leadership, though it really creates a false sense of security, fosters narcissism and distracts from authentic leadership competencies. However, like it or not, charismatic leadership helps leaders to establish greater public credibility. Emotional intelligence (EI) and people skills include practicing inspirational leadership (getting people mobilized) and motivational leadership (sustaining momentum) (Barent, 2005). The characteristic relationships can be illustrated by table 5.2.2 below.

Table 5.2.2.

*Types of Public Competencies*

<table>
<thead>
<tr>
<th>Charismatic leadership</th>
<th>A dynamic personality attracts followers.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visionary</td>
<td>Establishes clear goals in following the leader.</td>
</tr>
<tr>
<td>Inspiration</td>
<td>Mobilizes followers into action.</td>
</tr>
<tr>
<td>Motivation</td>
<td>Maintains follower momentum.</td>
</tr>
<tr>
<td>Public speaking (the art of oratory)</td>
<td>Communicates vision, inspires &amp; motivates.</td>
</tr>
<tr>
<td>Emotional intelligence &amp; people skills</td>
<td>Deals with followers in the right way.</td>
</tr>
</tbody>
</table>
Schools, like any businesses, deal with people, and education managers need good emotional intelligence and people skills to deal with their people effectively. Cavanagh (2010), for example, examined the importance of managing collegiality in school leadership. He showed how many education managers have great technical skills as teachers and have worked their way up the management ladder, but they treat their subordinates like misbehaving children, not like responsible adults. This can lead to autocratic and disrespectful behavior. Of course the opposite is also a problem, as laissez faire leadership leads to chaos. Balancing leadership styles is a real challenge, and applying the appropriate style in the right context requires real wisdom.

c. Discussion.

Marketing management was rated at 37.9% by 11 respondents as ‘would be helpful’ and at 46.9% by 15 respondents for both a course and seminar. Organizational political leadership was rated at 41.4% by 12 respondents as ‘not urgent’ and at 31.3% by 10 respondents for private reading. Local leadership was rated at 37.9% by 11 respondents as ‘can be provided’ and at 40.6% by 13 respondents for private reading. Global leadership was rated at 31% by 9 respondents as ‘not urgent’ and at 40.6% by 13 respondents for both a seminar and private reading. None of these competencies are considered very important to the education managers, but the business managers disagreed. Every one of them was mentioned as real needs, some more than once.

Charismatic leadership was rated at 27.6% by 8 respondents as both ‘not urgent’ and ‘can be provided’, and at 53.1% by 17 respondents for private reading. Emotional intelligence (EI) and People skills was rated at 41.4% by 12 respondents as ‘can be provided’ and 37.9% by 11 respondents as ‘would be helpful’, and at 59.4% by 19
respondents for a course. Inspirational leadership was rated at 31% by 9 respondents as ‘would be helpful’ and at 37.5% by 12 respondents for private reading and mentoring/coaching. Motivational leadership was rated at 31% by 9 respondents as ‘would be helpful’ and at 38.7% by 12 respondents for a course. Public speaking was rated at 37.9% by 11 respondents as ‘not required’ and at 56.3% by 18 respondents for a course. Visionary leadership was rated at 34.5% by 10 respondents as ‘would be helpful’ and at 43.8% by 14 respondents for a seminar. The pattern here seems to indicate that most education managers considered themselves sufficiently endowed with these competencies or considered them as “not required”, but the business managers certainly differed with this evaluation, mentioning most of these competencies as ‘urgently required’.

How does the group develop these all these process and public competencies?
There is a strong link between strategy and vision, the two leading competencies in the first two ‘clusters’ of competencies. Both need to be effectively established at head office and clearly communicated to the schools. Then the education management teams need to ‘buy in’ to them and ‘sell’ them to their staff and parents. This is quite a challenge for the South African school group.

3. People Competencies – Human Resources

The next largest ‘cluster’ is the 9 human resource group of competencies. They are focused more on ‘people’ than ‘processes’. They are human resource management (HRM), empowering subordinates, performance management, shared and distributed leadership, succession management, sustainable leadership, team leadership, training and development (HRD), and transformational leadership.
These 9 ‘people’ competencies can be divided into 2 main groups: human resource management (HRM), and human resource (or training and) development (HRD). The first is concerned about the processes that manage people and the second is concerned with developing the people that perform the processes. Human resource management (HRM) includes performance management, succession management, team leadership, and sustainable leadership. Human resource (or training and) development (HRD) includes empowering subordinates, shared and distributed leadership, and transformational leadership. Obviously there is some overlap between managing and developing these competencies.

Table 5.3 lists these two groups of competencies, which makes it much easier to see the differences between them.

Table 5.3.

*People Competencies – Human Resources*

<table>
<thead>
<tr>
<th>Human Resource Management (HRM)</th>
<th>Human Resource Development (HRD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance management</td>
<td>(Performance management)</td>
</tr>
<tr>
<td>Team leadership</td>
<td>Empowering subordinates</td>
</tr>
<tr>
<td>Succession management</td>
<td>Shared Leadership</td>
</tr>
<tr>
<td>Sustainable leadership</td>
<td>Distributed Leadership</td>
</tr>
<tr>
<td>(Transactional Leadership)</td>
<td>Transformational leadership</td>
</tr>
</tbody>
</table>

a. Performance management.

Performance management should be a managerial and a developmental tool, hence it has been placed at the top of both columns. Appraisals should not simply be
done once at the end of the year as a summative assessment, but they should be working
documents used from the beginning of the year. Busher (2006) reported on a standard
response of a female middle leader on performance management in her school whose
colleagues do not like:

doing performance management but recognize that it is a hoop that they have to
jump through. I think it is quite a positive and productive thing. If you do it every
so often it makes you think a little bit more about what you are doing. That has a
knock-on effect on the rest of your teaching. (p. 77)

The author outlined that educators often resent the effort that they need to put into a good
performance management system (PMS), but they usually appreciate its benefits. The
manner in which it is done will usually ‘make or break’ the system. The criteria that it
measures and the way that it is handled need to be relevant and people-sensitive. He
pointed out that performance management is sometimes either very simply done by one
or two classroom visits, or it is not done at all, but that it is a useful tool for both
individual and organizational development. Educators are resistant to the idea of
performance management, because it seems to question their sincerity and competence as
educators. Yet, at the end of the day, they do recognize its usefulness. If the performance
management system (PMS) is implemented in the right way it can be welcomed by staff
as a useful tool; if not, it can fail miserably. Busher (2006) acknowledges the difficulties
of doing appraisals in an education context, yet insists that they can be a useful tool, if
done appropriately.

Obviously a South African school group would have some standardization which
they would have to ‘enforce’ on all the schools in the group. Staff should be given the
appraisal at the beginning of the year so that it is clear what criteria are being used to appraise them. Managers should meet individually with staff preferably once a term or at least every half year to discuss progress. Specific areas of improvement should be addressed and appreciation be shown for strengths. Performance appraisals should be a conversation, a dialogue rather than a monologue, throughout the year. They should be both formative and summative.

b. Team leadership.

School principals a few decades ago were more autocratic and totalitarian in their approach, but the expansion of modern democratic values has brought about a stronger focus on team leadership (Smith, 2010).

c. Succession management.

If the staff is being developed effectively, then succession management should be a natural progression from one level to another. Of course, the process of promotion should be just as open and transparent as the performance appraisal system. Croneyism and corruption should be avoided, and competence and commitment fostered for making the right choices for management. Just because someone has been around for a long time does not necessarily mean that they are ready for management. A good class teacher does not always make a good manager, though, so management skills should be tested before a teacher is promoted. Promotion from within is usually better, as it encourages healthy ambition and ensures the retention of corporate knowledge. Sometimes, though, external recruitment is better, particularly where no suitable candidate can be found, but this can often lead to resentment (Bush, 2005).
d. Sustainable leadership.

In most educational contexts there is not a high turnover of staff, as educators are usually in the profession for the ‘long run’, but difficult education managers can cause a mass exodus from the organization. Educators will typically work for a decade before receiving their first promotion and two decades before getting into senior management. Principals usually have around three decades of experience. The education management ‘pipeline’ is long and difficult, forged through years of classroom and management experience (Leithwood, 2006).

The problem of recruiting and retaining the right leadership in a particular school is at the heart of sustainable leadership. In any organization there is the continual debate of whether to recruit from within or without. Ideally recruiting from within creates a healthy ambition from the staff and knowledge retention is assured, but it can lead to unhealthy ‘backstabbing’ and replication of bad practices. Outside recruitment can be helpful if there is no suitable internal candidate, but then the question must be asked ‘why?’ this is the case. In a whole staff of educators has the development of educators been insufficient, or are there major changes that require outside expertise for the task?

Retaining leaders, even when personal and professional clashes with staff and parents become evident, is the greatest challenge of all (Dempster, 2011).

e. Empowering subordinates.

Leaders with ‘control issues’ are a nightmare to deal with in a management team and by followers. So many ‘power-hungry’ ‘control freaks’ seem to get into leadership positions for the wrong reasons. Their desire for control is seen as ‘leadership potential’, but all they end up doing is alienating subordinates. Subordinates need to be empowered,
and the best way to achieve this is through shared and distributed leadership (Daresh, 2003).

f. Shared and distributed leadership.

When leaders share power and control, they make life easier for themselves and equip subordinates. However, they need to ensure that this leadership is fairly and appropriately distributed amongst staff to prevent resentment from overloaded managers or jealousy from those who feel overlooked (Johnson, 2009).

g. Transformational leadership.

Transformational leadership is often contrasted with transactional leadership. However, it is impossible to be effectively transformational without a sound transactional relationship. People need to know why they are there and be committed to stay there before leaders can work to transform them and the organization. Temporary or part-time staff members usually have little or no interest in anything more than a salary. Transformational leadership needs to be driven by a sincere motive on the part of the organization and leader, and resonate with the minds and hearts of subordinates (Telford, 2003).

h. Discussion.

Human resource management (HRM) was rated at 31% by 9 respondents as ‘not urgent’ and ‘would be helpful’, and at 56.3% by 18 respondents for a course. Performance management was rated at 34.5% by 10 respondents as both ‘can be provided’ and ‘would be helpful’, and at 53.1% by 17 respondents for a course. Team leadership was rated at 34.5% by 10 respondents as ‘would be helpful’, ‘can be provided’
and ‘not required’, and at 50% by 16 respondents for a course. Succession management was rated at 35.7% by 10 respondents as ‘would be helpful’ and at 37.5% by 12 respondents for both a seminar and mentoring/coaching. Sustainable leadership was rated at 51.7% by 15 respondents as ‘would be helpful’ and at 46.9% by 15 respondents for a course. Empowering subordinates was rated at 42.9% by 12 respondents as ‘would be helpful’ and at 51.6% by 16 respondents for mentoring/coaching. Shared and distributed leadership was rated at 48.3% as ‘can be provided’ by 14 respondents as and at 46.9% by 15 respondents for private reading.

None of the HR competencies was considered ‘urgently needed’ by any of the respondents, though most were recognized as ‘would be helpful’. A course was chose by the vast majority of respondents for most of the competencies. Significantly, though, transformational leadership was rated at 31% by 9 respondents as ‘would be helpful’ and at 43.8% by 14 respondents for private reading. Transformational leadership was specifically mentioned by 3 out of 4 business managers as ‘urgently required’, in direct contrast to the education managers’ perception. Clearly education managers need to get beyond a transactional relationship with their subordinates, and it is doubtful whether ‘private reading’ would be sufficient for this purpose. It is highly likely that education managers have not given deep thought to the differences between the two, as they are not concepts that are used frequently in education.

4. Pastoral Competencies – Caring for all Stakeholders

The next ‘cluster’ of 6 is the more ‘pastoral’ group of competencies focused on ‘prevention rather than cure’. They are caring and pastoral leadership, corporate social responsibility (CSR), customer relationship management (CRM), ecological leadership,
safety, health, environment and risk (SHER), and servant leadership. By its very nature, the field of education is a ‘caring’ profession, and most people who enter it do so because they really care about people and the environment. Caring for all stakeholders is also ‘good business’, as it promotes goodwill in the primary nurturing function of the school and ensures that the customers and consumers are satisfied. Table 5.4 below outlines the differences between these 6 ‘pastoral’ competencies.

Table 5.4.

Pastoral Competencies– Caring for all Stakeholders

<table>
<thead>
<tr>
<th>Competency</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caring and pastoral leadership</td>
<td>Caring for everyone.</td>
</tr>
<tr>
<td>Corporate Social Responsibility</td>
<td>Caring for community.</td>
</tr>
<tr>
<td>Customer relationship management</td>
<td>Caring for parents.</td>
</tr>
<tr>
<td>Ecological leadership</td>
<td>Caring for the environment.</td>
</tr>
<tr>
<td>Safety, Health, and Environment and Risk</td>
<td>Caring for the students’ health &amp; safety.</td>
</tr>
<tr>
<td>Servant leadership</td>
<td>Caring for subordinates.</td>
</tr>
</tbody>
</table>

Caring and pastoral leadership is the preeminent competency to the other five. Only leaders with genuine care and a pastoral heart can master the other competencies sincerely. If we do not treat others in this way, then they will not be happy (Begley, 2008).

Servant leadership deals with caring for our subordinates, our employees, the people that help us run our schools efficiently. They are our first priority. Leaders must first be concerned about their followers, otherwise they cease to be leaders (Trompenaars & Voerman, 2009). If we do not care about them, then it will reflect in the way they
interact with the pupils. If teachers are not happy, then pupils will not be happy (Dierendonck & Patterson, 2010).

Safety, health, environment and risk (SHER) deals with caring for consumers, the pupils, who are making use of the education process. If the pupils are not happy then their parents will not be happy. If we are not protecting and educating them, then their parents will not be happy (Sanders, 2007).

Customer relationship management (CRM) deals with caring for customers, the parents, who are paying for their children, the consumers, to be educated by the school. If the children are not happy, then the parents are not happy and the community will not be happy (Smith, 2010).

Corporate social responsibility (CSR) deals with caring for people outside the school environment, particularly those in desperate need, as recognition of our duty to the wider community. If our community is not happy then it will not take care of the environment. A good school can make a profound impact and create a ripple-effect on the community (Quinn & Baltes, 2007).

Ecological leadership deals with caring for the natural environment, both flora and fauna, the context that we all have to live in. If the environment is not in harmony, then people are not happy (Murphy, 2005).

Spiritual leadership has been deliberately omitted from this list, as the education managers are not called to the role of spiritual pastors, but that of spiritual leaders. They should lead assemblies and demonstrate spiritual qualities, but should avoid doctrinal disputes and denominational issues. Their personal and vocational visions should
ultimately be spiritually directed. This competency is, however, included in the next section of ‘personal competencies’. Obviously not all schools emphasize spiritual leadership, but rather adopt a more secular approach, as is the trend all over the world. The South African school group in this study considers spiritual leadership to be an important leadership competency and selects its employees from those people that share this view.

So how do we develop these pastoral competencies? Caring and pastoral leadership was rated at 32.1% by 9 respondents as ‘can be provided’ and at 53.1% by 17 respondents for mentoring/coaching. Corporate social responsibility (CSR) was rated at 46.4% by 13 respondents as ‘can be provided’ and at 46.9% by 15 respondents for a seminar. Customer relationship management (CRM) was rated at 31% by 9 respondents as ‘can be provided’ and at 38.7% by 12 respondents for a course. Ecological leadership was rated at 39.3% by 11 respondents as ‘not urgent’ and at 34.4% by 11 respondents for both a seminar and private reading. Safety, health, environment and risk (SHER) was rated at 32.1% by 9 respondents as ‘not urgent’ and at 53.1% by 17 respondents for a course. Servant leadership was rated at 34.5% by 10 respondents as ‘not urgent’ and at 40.6% by 13 respondents for private reading.

The clear pattern that emerges in the survey is that respondents felt that these competencies were either ‘not urgent’ or ‘can be provided’. Most educators are in the field of education because they care about people, so there is no significant concern that these competencies are seriously lacking. The range of CPD methods given in the survey suggests that these competencies can be developed in every possible way and at all times to foster a culture of care.
5. Personal Competencies – Doing What is Right

The next ‘cluster’ of 5 is those that deal with the importance of the personal ‘internalized’ competencies of ethical leadership, moral leadership, reflective leadership values leadership, and spiritual leadership (Houston, Blankstein & Cole, 2007). These reflect traits and characteristics that are generally accepted to represent people of integrity and uprightness, and are particularly expected of our leaders in the Western world. These competencies focus on the leader’s relationship with God, society, organizations, the teaching profession and the South African school group. A spiritual orientation is not always found in schools, but it is an important emphasis in the South African school group. Table 5.5 below shows the differences between the 5 main personal competencies.

Table 5.5.

<table>
<thead>
<tr>
<th>Personal Competencies – Doing What is Right</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spiritual leadership</td>
</tr>
<tr>
<td>Moral leadership</td>
</tr>
<tr>
<td>Ethical leadership</td>
</tr>
<tr>
<td>Reflective leadership</td>
</tr>
<tr>
<td>Values leadership</td>
</tr>
</tbody>
</table>

The South African school group has a strong spiritual, Christian ethos, and would consider all its values, morals, ethics and reflective thinking to be derived from a Biblical worldview. This is used as an effective marketing tool in a majority Christian nation where most parents want a Christian worldview and principles to guide their children. However, the schools do not seek to function as churches or even church-based schools,
but rather to complement the Christian philosophy of the vast majority of its parents, since the population of South Africa is roughly 80% Christian.

Bush (2006) emphasized the call for ethical leadership in the education management literature. He advocated “a critical ethical perspective on educational leadership and management rather than a narrowly economic one” and noted that ethics “are involved in every decision that is taken by leaders, be they teachers or school principals, as they struggle to meet the competing demands on them” (p. 82). Begley and Johansson (2003), Begley and Stefkovich (2007), and Begley, Conyers, and Tuana (2008) discussed the place of ethical leadership in the education context in more detail, emphasizing that the challenge is far greater in schools than in virtually any other sphere, as there are academic, youth and financial issues for the education manager to deal with simultaneously.

What CPD methods should be used? Ethical leadership was rated at 31% by 9 respondents as ‘not urgent’ and at 46.9% by 15 respondents for mentoring/coaching. Moral leadership was rated at 31% by 9 respondents as ‘not urgent’ and at 50% by 16 respondents for mentoring/coaching. Reflective leadership was rated at 39.3% by 11 respondents as ‘can be provided’ and at 34.4% by 11 respondents for both a course and mentoring/coaching. Spiritual leadership was rated at 28.6% by 8 respondents as ‘not urgent’ and at 56.3% by 18 respondents for private reading. Values leadership was rated at 31% by 9 respondents as ‘can be provided’ and at 53.1% by 17 respondents for private reading. It seems that private reading and mentoring/coaching are the most popular CPD methods. However, there is surely a place for a more public forum for these issues to be defined and discussed more clearly.
6. Problem Competencies – Dealing with Issues

The next ‘cluster’ of 3 is that which deals with ‘problem’ competencies of conflict resolution, crisis management, and stress management. Smith (2010) identified crisis management as crucial, and the other two competencies are placed at the top of the list by survey and interview results. These three competencies are interconnected and interdependent, as illustrated by table 5.6 below.

Table 5.6.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stress management</td>
<td>Solving situations that cause stress.</td>
</tr>
<tr>
<td>Conflict resolution</td>
<td>Solving situations that lead to conflict.</td>
</tr>
<tr>
<td>Crisis management</td>
<td>Solving situations that have escalated to crisis point.</td>
</tr>
</tbody>
</table>

Stress is a normal part of daily work and the school environment is no different in this respect. In fact, sometimes it is even more stressful because of the challenges of dealing with children. Stress management is thus placed at the pinnacle of the triangle, as it is always present in the other two circumstances and can exist apart from them.

Bristow, Ireson, and Coleman (2007) have written an outstanding guide for principals and stress management, which should be required reading for them. Particularly stressful situations lead to conflict and often cause a crisis.

Smith and Riley (2010) do not even mention conflict resolution as one of their ‘big nine’ competencies, though they do include ‘crisis management’ as one (p. 52). These two competencies are clearly linked, but they are not identical. Conflict can lead to a crisis if it is not handled correctly, and a crisis can happen without conflict. Sometimes
an unexpected crisis emerges and it causes stress and often conflict. Sometimes conflict arises and it causes stress and often leads to a crisis (Mpungose, 1999). Negotiation skills are necessary in all three.

What, then, are the best CPD methods to use for these ‘problem’ competencies? Conflict resolution was rated at 27.6% by respondents equally as ‘can be provided’, ‘would be helpful’ and ‘urgently required’, and at 46.9% by 15 respondents for a course. Crisis management was rated at 37.9% by 11 respondents as ‘can be provided’ and at 59.4% by 19 respondents for a course. Stress management was rated at 48.3% by 14 respondents as ‘would be helpful’ and at 43.8% by 14 respondents for a course. A course has the time period of a few days and with participation by regional schools together in one place.

There are some very useful tools (Thomas & Kilmann, 1977) that have been developed as conflict behavior measurement mechanisms and can be used for useful CPD exercises. These are widely used in business, but can be applied to any organizational context, including education. Of course, there is no better way to resolve conflict than effective communication, though sometimes it does require intervention and mediation from third parties. Education managers can play this role most effectively.

7. Proactive Competencies – Continuous Improvement

The next ‘cluster’ of 3 is those that deal with proactive ‘continuous improvement’ (a common British term in education development) competencies. They are adaptable leadership, change management, and innovation and entrepreneurship. Table 5.7 below helps in understanding the relationship between these three competencies.
Table 5.7.

**Proactive Competencies – Continuous Improvement**

<table>
<thead>
<tr>
<th>Competency</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adaptable leadership</td>
<td>The ability to change one’s leadership style when the situation demands it.</td>
</tr>
<tr>
<td>Change management</td>
<td>The ability to use good leadership to change the situation when it is demanded.</td>
</tr>
<tr>
<td>Innovation and entrepreneurship</td>
<td>The ability to look at new solutions to change existing situations.</td>
</tr>
</tbody>
</table>

Adaptable leadership is at the top of the table, as it leads to effective change management, and Innovation and entrepreneurship. Both of these require adaptable leadership to be effective.

Change management (CM) is doing things differently, in an already established manner, a new way, or a manner that is new to the organization. It often leads to authentic Innovation and entrepreneurship, but not in every case. Often it is simply replication of what works elsewhere (Kotter, 2008).

Innovation and entrepreneurship is doing things differently, specifically in a new way. It always needs adaptable leadership and change management to be implemented effectively (Blake, 2009).

So how does the group develop these competencies? Adaptable leadership was rated at 37.9% by 11 respondents as ‘would be helpful’ and at 37.5% by 12 respondents for both private reading and mentoring/coaching. Change management was rated at 32.1% by 9 respondents as ‘would be helpful’ and at 46.9% by 15 respondents for a seminar. Innovation and entrepreneurship was rated at 37.9% by 11 respondents as ‘would be helpful’ and at 37.5% by 12 respondents for a course and seminar. The whole
range of CPD methods were classified a ‘would be helpful’, from the strategic need for the group to change the mindset and practice of the schools to come into line with organizational goals, to the tactical requirements specific to every school.

Limitations of the Design

The main limitations of the design of this study included the scope of the study survey response rates, interviewee receptivity, and researcher objectivity. The scope of the study is limited to a particular school group in one country, but the scope and results are similar to Smith (2010) in Australia, and it reflects a significant amount of other research, as demonstrated in the literature review and the list of references. An anonymous online survey has its restrictions and the researcher experienced difficulties in assuming the research role, largely due to a delay in and lack of response from very busy business and education leaders at the end and beginning of the school year. Interviews can sometimes put people ‘on the spot’, but the responses were consistent and the interviewer did not prompt interviewees in any way. Personal bias was averted by the objective methodology of the questionnaire and avoiding suggestion in the interviews. The main limitations of the design were thus largely overcome, though it is impossible to prevent them altogether.

Review

Through this research the most significant business leadership competencies required by education managers in a South African school group have been identified. They have been classified in ‘cluster’ patterns to make it easier for the group to do CPD. This data can be used by the South African school group to develop its education managers and lead to further research by other academics.
Future Research Considerations

Further research can be done by other academics based on this study. This study has extracted a list of business leadership competencies from the global literature, but has focused research on only one South African school group. Other case studies in South Africa or other countries would provide more data to provide a truly global consistency in identifying the most important competencies for business leadership in education management. It could also show differences in priorities in different cultures and countries. The survey instrument could be replicated or modified accordingly, expanding the study to include other constituents or qualitative interviews.

Conclusion

The tension between instructional leadership and business leadership in an education management context is one that is difficult to resolve. The organization has a budget and expects its managers to run the organization according to accepted managerial practices. This research showed that there are distinct business leadership competencies that are lacking and need to be developed in education management teams in the South African school group. The move to focus more on business administration competencies than instructional leadership for education managers is evident in the literature. The need for continuing professional development of stress and conflict management competencies was very clear in the South African school group in this study. Financial management, customer relationship management, and performance management were also rated very highly.

The clusters of competencies (conveniently 7 P’s) as process, public, people, pastoral, personal, problem, and proactive may be useful touchstones for CPD for the
group. CPD can likely be most effectively be done through courses linking regional schools together over a few days to work through relevant issues together. This can be linked to other CPD methods that may be appropriate, from national conferences to mentoring and coaching to private reading. The group is going through a period of tremendous growth, so the challenges of running the business of education in its schools will be ongoing. This study will hopefully help the South African school group develop mechanisms to assist in defusing tensions, prevent potential problems and proactively foster business leadership competencies amongst its education managers.
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Appendix A: School Survey Guide

Dear Executive, Operational and Phase Heads of [name omitted] Schools

You are kindly requested to complete an online survey by Friday 25 January 2013 at http://www.surveymonkey.com. This is part of a collaboration between the [name omitted] Schools group and an independent researcher doing his PhD in Leadership at an American university. This document is a guide on how to complete the survey properly, which will take around an hour to complete. It is very important that you do it thoughtfully and thoroughly without rushing through it. Keep this guide at hand when you do it, as you will find it helpful. The researcher will be meeting with [name omitted] Head Office in the last week of January 2013 to discuss the results of this survey, and if your school and executive members of staff have not completed the survey by then, it will reflect very poorly on your school and leadership.

Page 1: Demographic Data

You and your responses will remain entirely anonymous throughout this survey. At no point will any personal or identifying data be collected about you. Your responses will be kept confidential, and in no way can or will they reflect negatively on you as a person, educator, manager or leader. You will only be asked to identify your school, city and region, as well as the number of education managers in your school executive, for research tracking and statistical purposes.

Page 2: Matching Business Leadership Competencies & Professional Development Activities

The approach of the survey is for you to think about the generic business leadership competencies that you need within your education management team on the
The survey gives you a list of 50 possible business leadership competencies and asks you to recommend the most appropriate professional developmental tools for them. This survey will help [name omitted] Head Office to plan relevant and meaningful professional development for you and the executive team members.

The 50 leadership competencies are:

- Adaptable leadership
- Administrative leadership
- Caring and pastoral leadership
- Change management
- Charismatic leadership
- Conflict resolution
- Corporate social responsibility (CSR)
- Crisis management
- Customer relationship management (CRM)
- Decision making
- Ecological leadership
- Emotional intelligence (EI) and People skills
- Empowering subordinates
- Enterprise resource management (ERM)
- Ethical leadership
- Event management
- Financial management
- Global leadership
- Human resource management (HRM)
- Innovation and entrepreneurship
□ Inspirational leadership
□ Knowledge management
□ Legal issues
□ Local leadership
□ Motivational leadership
□ Moral leadership
□ Marketing management
□ Organizational political leadership
□ Performance management
□ Project management
□ Public speaking
□ Reflective leadership
□ Safety, health, environment and risk (SHER)
□ Servant leadership
□ Shared and distributed leadership
□ Spiritual leadership
□ Steward leadership
□ Strategic leadership
□ Stress management
□ Succession management
□ Sustainable leadership
□ Team leadership
□ Technology leadership
□ Time management
□ Total quality management (TQM)
□ Training and development
□ Transformational leadership
Values leadership
Visionary leadership
Writing communication

You are also given the option to add any other competencies to the list at the end, as you see appropriate. The assumption is that you as an education manager in a private school will need all these competencies at some point or another. Look through this list again and make sure that you fully understand the definition and implications of each. You may want to Google one or more of them to make sure that your understanding is correct.

You will be given a choice of six common possible continuing professional development (CPD) methods to be matched to these competencies:

- Conference (usually up to a week and with the entire South African school group);
- Course (usually a few days and with regional schools);
- Seminar (usually a few hours and with schools in the same city);
- Mentoring or Coaching (of the school executive education management team by head office);
- Part-time study (formal education for individuals in their own time);
- Private reading (informal education for the individual or the team); and
- Other (feel free to suggest your own method of continuing professional development).

You are also given the option to add any other method(s) to the list as you see appropriate. Please choose the activities that, in your opinion, are the most appropriate for developing the relevant competency. You may choose more than one option.
Now that you have given these competencies some serious thought, decide on the level of priority of each of these competencies for your team. Your choices are:

- □ Not required
- □ Not urgent
- □ Can be provided
- □ Would be helpful
- □ Urgently required

Please be honest. Consider the education management team as a whole. If you put all your competencies together, what would you say is most needed?

Page 4: Comments

Please do not make any personal references to individuals that will identify them or compromise their position. This is not the aim of the survey. Do not be vindictive or malicious, but try to be as objective and impartial as possible. This is not an opportunity for you to ‘vent’ about a team member. Keep your focus on the 50 (or more) business leadership competencies that are being examined. Try to be constructive in your comments. You are part of a team with strengths and weaknesses. Reflect on the competencies that you deem a priority and motivate why you have chosen the particular developmental methods in the survey. Please feel free to also give general feedback on the survey as a whole: the quality, relevance and any improvements that can be made to it.

Thank you for taking the time to do this survey. It is hoped that it will help you, your school team and group of schools to grow in your business leadership competencies.
### Appendix B. Survey Statistics Numerical Summary of Responses

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### Appendix C: Summary of Developmental Mechanisms Identified (Table and Graph)

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### Appendix D: Summary of Competencies Identified (Table and Graph)

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Appendix E: Feedback on Team Professional Development Priorities

These were the open responses at the end of the survey. Only typographical corrections have been made to make the comments readable. Some of the responses were in Afrikaans and these are translated in brackets afterwards.

- Health and Safety is a risk area. Performance and reward and a TQM approach are imperatives.

- It is very important to market a private school as a business. We are living in a global world and need to keep up with new developments all over the world. Technology is the future and we need to keep up and be aware of the new developments and competencies we need. We need to have quality in every section of our schools.

- The issues marked urgently are those that would ensure I can do my task as a manager much easier and deal with issues as needed.

- Our management team is still busy [South African school group name omitted]-fying our school and thus still need to get to that place where we can sit and talk about our vision for the future.

- All the professional development priorities that was marked urgently are priorities that need development to enable a school to function at its best.

- Change management: Omdat ons 'n bestaande skool is wat oorgekoop is, is dit baie keer belangrik dat ons verandering onder personeel, ouers moet bestuur. Conflict Management: waar mense met mense werk is daar altyd konflik. CRM: weereens om 'n goeie diens te lewer is crm belangrik.

People Competencies: weereens ons werk met mense. Empowering
subordinates: om take te delegee en mense te bestuur om dieselfde
verantwoordelikheid te vat vir hul uitvoering van take as jyself.
Performance management: as my skool verbeter elke jaar verbeter [name
omitted] en maak ons onstuitbare handelsmerk.

*English Translation.* Change management: Because we are an existing
school that was purchased by someone else, it is often important that we
have to manage change amongst personnel and parents. Conflict
management: where people work with people there is always conflict.
CRM: again, to deliver a good service CRM is important. Empowering
subordinates: to delegate tasks and manage people to take the same
responsibility for their execution as yourself. Performance management: if
my school improves every year then [name omitted] improves and we
make an unstoppable brand.

- ICT training must be provided to the whole staff. Enrolment of tablets in
  the class room is an area where we all need assistance
- Priorities urgently required, as seen for a management team of any school
  in general.
- A leader is in essence a person with influence. As such his words and
  actions need to be congruent. Behaviour that is not congruent is not
  influential.
- We work under great stress; too much work; not enough teachers; too
  much admin
• We are under a lot of pressure to do a mass of work in limited time. Nerves are rubbing against nerves. Help us to understand each other, then we know what to expect from each other. Will help to motivate each other in his/her field of expertise to the benefit of whole group. Difficult to tell people what to do when they do not respect the leader and when leader does not live a good example. At [name omitted] we are a very happy family and get along very well. We would love to keep up this great team feeling!

• Interesting and thought provoking. Must points are taken for granted in the school world...

• Conflict, Crises, Stress, Succession, Team, Time and Total quality management I believe are all inter related and are the main stressors for managers. Correct Performance management is crucial to having a well motivated staff. Technological empowering of managers is crucial. Training and development of the managers is crucial to keeping their motivational levels high.

• Dit was 'n goeie vraelys wat kan help om ons as bestuurspan se vaardighede en bestuurstyl te bevorder.

  English Translation. It was a good questionnaire that can help us as a management team develop our competencies and management styles.

• Work under extreme stress. Issues not resolved. No democratic decision making - autocratic. Have to resolve conflict each day. Must take pride in your work - customer relationship can be better. More innovation and
entrepreneurship strategies to teach students. Moral are down - need ethical and empowering leadership to pick up the team.

- It is a good thorough survey.
- We are in the people business. For our company and schools to grow, our customer relationships are crucial. Most of the school management consists of teachers. We run a multi million rand business. Financial management is one of the biggest stressors. HR is a big part of any school manager’s job. A school can only be as good as its teachers.
- None marked as urgently required. Any training which adds value to an organisation is of value.
- Not all the development priorities are applicable.
- I cannot make a comment on these activities at this time...
- Seeing that we'll be entering a brand new school where everything will be new, buildings, learners, staff ..., it will be good to become a unity asap.
- None marked urgent, but certainly as a new school time and strategy needs to be directed to Change Management, Crisis management especially in today's society, Finance Management is essential especially for a senior management team with scope on understanding budget constraints, preparation of budgets and expense approvals especially as an independent school. It is imperative that a Management team has sufficient knowledge of HR applications and best business practices, especially when managing staff.
Appendix F: Consent to Participate in a Study of a Qualitative Nature

Tennessee Temple University Ph.D. in Leadership Program

*Human Subjects Review Board Proposal*

1. Name of principal investigator: Dieter Leon Thom

2. Purpose of study:
   
   The purpose of this study is to determine how emerging and existing school education managers in a South African school group can be more effectively prepared and equipped for business leadership in their jobs.

3. Method:
   
   Education managers complete the online survey and business managers are interviewed at the group head office.

4. Nature of human subjects:
   
   In this dissertation the distinction will be made between education managers and business managers. Education managers are defined in this study as educators that have worked their way through the relevant education system to become leaders in their organization. Business managers are defined in this study as leaders that have worked their way through various leadership positions (in education and/or business), and are now working in the higher echelons of the education group. All are now managers at head office controlling the administrative functions of the group and have the education managers reporting to them.

5. Duration of project (with inclusive dates):
   
   July/August 2012 – Proposal finalized with supervisor.
September/October 2012 – Proposal negotiated with South African school group head office.

November/December 2012 - Initial survey research done.

January 2013 – Survey completed and specific interview research done.

February 2013 – Survey research collated and interview transcripts completed.

March 2013 - Results analyzed.

April 2013 - Draft written.

May 2013 – First draft submitted to supervisor.

June/July 2013 – Further revisions completed.

July 2013 - Dissertation assessed by committee.


6. Statement of any possible risk to subjects:

There are no possible risks to subjects. The survey respondents are entirely anonymous and the name of the group, individual schools and identity of the interviewees will be kept completely confidential. No confidential information about the group will be made public.

7. Whether study should be exempt from full review by the Graduate Committee: Yes.

1. The study is conducted in established educational settings involving research on regular and ongoing instructional events.

2. The subjects are unidentified.

3. The research is a surveyor observation of human behavior:

   a. Responses are recorded in a way that subjects cannot be identified.
b. Responses would not place subject at risk of criminal liability or damage to finances, employability or dignity.

c. Research does not deal with “nonpublic” behavior.

8. Expected outcomes of study:

This study is designed to assist groups of schools to survey their education managers and interview their business managers, and develop a clear strategy for business leadership continuous professional development in the group.

9. Funding source(s): Private (researcher).
Tennessee Temple University Ph.D. in Leadership Program

CONSENT TO PARTICIPATE IN A STUDY OF A QUALITATIVE NATURE

Title of Research Study: Business Leadership Continuing Development of Education Management Teams in a South African School Group

Project Director: Dieter Leon Thom  dieterthom@gmail.com

Purpose of the Research
The purpose of this study is to determine how school education managers in a South African school group can be more effectively prepared and equipped for business leadership.

Procedures for this Research
This study will survey education managers and interview business managers of a school group.

Potential Risks of Discomforts
Subjects may be concerned that their answers to the survey or interviews may be used against them or that confidential information about the organization may be made public.

Potential Benefits to You and Others
The study will develop a clear strategy for business leadership continuous professional development in the group. The results will be compiled into a PhD dissertation.

Alternative Procedures
There are no appropriate alternative procedures or courses of treatment that might be advantageous to the subject.

Protection of Confidentiality
The survey respondents are entirely anonymous, and the name of the group, individual schools and identity of the interviewees will be kept completely confidential. No confidential information about the group will be made public.

Signatures
If you agree to participate in this research project, please read the following statement:

I have been fully informed of the above-described project with its possible benefits and risks and I have given permission of participation in this study. Please sign below.

Signature of Participant: ___________________________  Signature of Person Obtaining Consent: ___________________________
Date: ___________________________  Date: ___________________________

Name of Participant (Print): Andrees Greyling  Name of Person Obtaining Consent (Print): Dieter Thom
Date: 3/08/2013  Date: 13/08/2013