

CHAPTER THREE

STRATEGIC LEADERSHIP AND MANAGEMENT IN INCLUSIVE SETTING

If the blind lead the blind, both shall fall into the ditch.

Matthew 15: 14.

3.1 INTRODUCTION

According to Bottery (2004; Hargreaves and Goodson, 2004), there is a renewed emphasis on improving leadership capacity and capability in the drive towards better performance and standards in schools. It is believed that quality leadership makes significant differences to schools and to learners' outcomes. There is a growing recognition in many parts of the world, including South Africa, that schools require effective leadership and management if they are to provide the best possible education for 'all' their learners (Bush, 2007). Fidler (2002; Stoll, Fink, and Earl, 2003) state that this requires strategic changes which will involve the whole organization in a holistic way. Schools should take account of pressures and influences from outside the school and take steps to ensure that planned activities will be sustainable over the medium term so that progression towards achieving long-term strategies proceed according to plan. After studying several leadership and management models, the researcher decided to discuss only the models that will be compatible with Inclusive Education principles in accordance with White Paper 6 (DoE, 2001), namely: strategic leadership, ecological leadership, transformational leadership, invitational leadership, political leadership, bureaucratic management, collegial management and political management.

In the next section the concepts 'strategy', leadership and leadership style and management will be discussed.

3.1.1 Strategy

Fidler (2002) clarifies the meaning of strategy as 'the pattern or plan that integrates an organization's major goals, policies and actions into a cohesive whole'. Fidler

(2002) argues that traditionally, strategy was associated with planning and states that it is better to think of strategy as a perspective and a holistic way of looking at things. Strategy does not focus on daily detailed activities but rather is concerned with the broad major dimensions of the organization such as medium and long-term frameworks. The template for strategies may be used for shorter-term planning of activities. To achieve the desired goals, schools as organizations have realized that their assets are their people who should remain or become competitive depending mainly on the development of a highly skilled workforce, requiring trained and committed educators who in turn require leadership, highly effective principals and the support of senior and middle managers (Bush, 2007).

The researcher deduces the meaning of strategy from the above paragraph as a specific longer term action that will take place. A well planned strategy will therefore be crucial in planning for the implementation of White Paper 6 on Inclusive Education. The inclusive ideal will only be realized when the leadership of schools invests in its people by empowering them with the skills that are necessary for specific actions in implementing Inclusive Education effectively.

3.1.2 Leadership and management

According to Bush (2007) a distinction should be made between *leadership and management*. The author links leadership with change and management with the maintenance of activities. However, he stresses the importance of both dimensions of organizational activities and argues that leadership means to '... influence others' actions in order to achieve desirable goals. 'Leaders are people who shape the goals and motivate so that the employees can engage in their work with passion' (Cuban, 2004 quoted by Bush, 2007; Farkas, Johnson, and Duffett, 2004). They often initiate change with the aim to reach existing and new goals. Leadership takes much ingenuity, energy and skill whereas management involves the efficient and effective maintenance of current organizational arrangements (Giuliani, 2002; James, 2005). Bush (2007) states that leaders are people who are concerned with the implementation of policies and decisions which will assist in directing the activities of an organization towards a specific goal. Much as managers often exhibit leadership skills, their overall function is focused on maintenance rather than change.

The researcher agrees with the above statement and is of the opinion that Inclusive Education needs leaders and managers who are able to implement the policies as stipulated by the South African Department of Education and who are able to make decisions in line with their specific school environments and the communities that they serve.

Bush (2007) attaches importance to both leadership and management because different settings and times require different responses. 'Leadership and management need to be given equal prominence if schools are to operate effectively and achieve their objectives'. Leadership and management are different but both are important. The challenges of modern organizations require an objective perspective of the manager as well as the flashes of vision and commitment that wise leadership provides (Bush, 2007). Nevertheless, the pressures from the external environment, such as the expectations of government mainly influence the aims of schools. This is often expressed through legislation or formal policy statements. Schools normally have the task of interpreting external imperatives rather than determining aims based on their own assessments of learners needs (Bush, 2007).

3.1.3 Leaders and leadership style

A leader is someone who sets direction in an effort to influence people to follow that direction. He/she sets direction by developing a clear vision and mission and conducts planning that determines the goals needed to achieve the vision and mission. Leaders motivate by the use of a variety of methods, including facilitating, coaching, mentoring, directing and delegating (Bush, 2007; Hesselbein & Johnston, 2002).

Leadership style depends on the circumstances of the school. However, other factors may affect leadership style. These may include the following:

- personal background,
- personality,
- knowledge,
- values,

- ethics, and
- experiences of the principal.

In other words, the leader's own perception of what will work for the school (Bush, 2007; Bielang, 2003: 36).

The researcher's opinion is that the life the principal lives and the kind of person he/she is, determines how he or she runs the school. If the principal lives a pleasant life of loving and being loved, being trusted and is an extrovert, there a better chance of him/her trusting and showing appreciation to his/her staff. Those who had a childhood of aggression and mistrust might display the same unpleasant characteristics, because that is what they know to be normal. The educators being supervised are individuals with different personalities and backgrounds. The leadership style used will vary according to what will be suitable for the individual employee and what he or she will respond to positively (Bush, 2007).

This researcher wants to argue that for this to be possible, the principal needs to make a deliberate effort to get to know his/her individual staff members and then needs to determine the best style that will suit each individual educators. This requires interaction at a professional and a personal level, through for example, team building activities. The school has traditions, values, a philosophy and concerns that will influence how the principal acts (Bush, 2007).

The researcher has not experienced principals going into a school and changing the traditions, values and philosophies. The principal risks being alienated by the staff that have been in the school for a long time and who have made themselves custodians of the traditions, values and philosophies of the school. A successful principal should study the traditions, values and philosophies of the school even before he/she takes the position in the school so such a principal can make informed decisions regarding either to support the traditions, values and philosophies of the school or to plan for changes that will be supported by educators.

3.1.4 Defining the concepts of leaders, managers and the functions of managers

A classic definition of managers and leaders is that 'leaders do the right thing and managers do things right'. A standard definition is that 'managers work toward the organization's goals by using its resources in an effective and efficient manner' (Bush, 2007). Managers are involved in four general functions, namely planning, organizing, leading and controlling.

Bush (2007) sheds more light on the four managerial functions in the following manner:

- **Planning**

Planning includes identifying goals, objectives, methods, resources, responsibilities and dates for completion of tasks. Examples of planning are strategic planning, business planning, project planning, staffing planning, advertising and promotions planning.

- **Organizing**

The aim of organizing is to achieve the goals in an optimum fashion. Examples of organising are organizing new departments, human resources, office and file systems.

- **Leading**

Leading includes setting direction for the organization, groups and individuals and influencing people to follow that direction. Examples of leading are establishing strategic direction (vision, values, mission and/or goals) and championing methods of organizational performance management to pursue that direction.

- **Controlling**

The aim of controlling to ensure the smooth running of the organization's systems, processes and structures in order to reach goals and objectives. This includes ongoing collection of feedback and monitoring and adjustment of

systems, processes and structures accordingly. Examples of controlling include the use of financial controls, policies and procedures, performance management processes and measures to avoid risks (Brundrett & Dering, 2006; Bush, 2007).

The above management tasks are proven ways of running schools effectively. The principal must always have a plan of action: long term and short term, including monthly, weekly and even daily planning. Based on these plans organization is effected. This in turn will be followed by leading the staff towards the achievement of the planned and organized activities. Controlling will then be appropriate, because educators will be aware of what has been planned and organized and will also be aware that monitoring will be done in order to determine whether the set aims are being achieved and that corrective action will have to be taken if not (Brundrett and Deiring, 2006).

It is important to acknowledge the leadership styles that have been employed through the years and then to shift to a leadership style that embraces inclusivity bearing in mind that there is a lot that can be learned from traditional leadership styles when dealing with eco-systemic diversities in inclusive school settings.

Davies and Davies (2009: 13) emphasis another type of leadership which attempts to improve current patterns of schooling within the existing paradigm of education, namely 'strategic leadership'.

3.2 THE STRATEGIC LEADERSHIP MODEL

Davies and Davies (2009: 13; Leithwood and Riehl, 2003) argue that strategic leadership is a critical component in the effective development of schools. Strategic leaders are concerned with setting direction. For the leaders to decide on the direction of the institution, they have to understand its history and the current situation. Davies and Davies give an excellent definition of strategic thinking namely '...the process by which an organization's direction-givers can rise above the daily managerial processes and crises to gain different perspectives of the internal and external dynamics causing change in their environment and thereby giving more effective direction to their organization". Such perspectives should be both future-oriented and historically understood. Strategic thinkers have the skills of looking both forwards and backwards while knowing where their organization is now, so that wise

risks can be taken by the direction-givers to achieve their organization's purpose while avoiding repetition of the mistakes of the past.

The researcher perceives the above as being applicable for the effective implementation of Inclusive Education. We need leaders who understand where we have been as a nation, where we should be and where we want to be in terms inclusivity within our school system. In the introduction and statement of the problem, the researcher has highlighted the need for a new unified education and training system so that imbalances of the past can be rectified (*cf.1*).

Strategic leaders are involved in the following activities:

- Direction setting.
- Translating strategy into action.
- Aligning the people and the organization to the strategy.
- Determining effective intervention points, and
- Developing strategic capabilities

(Davies & Davies, 2009:13; Leithwood & Riehl, 2003)

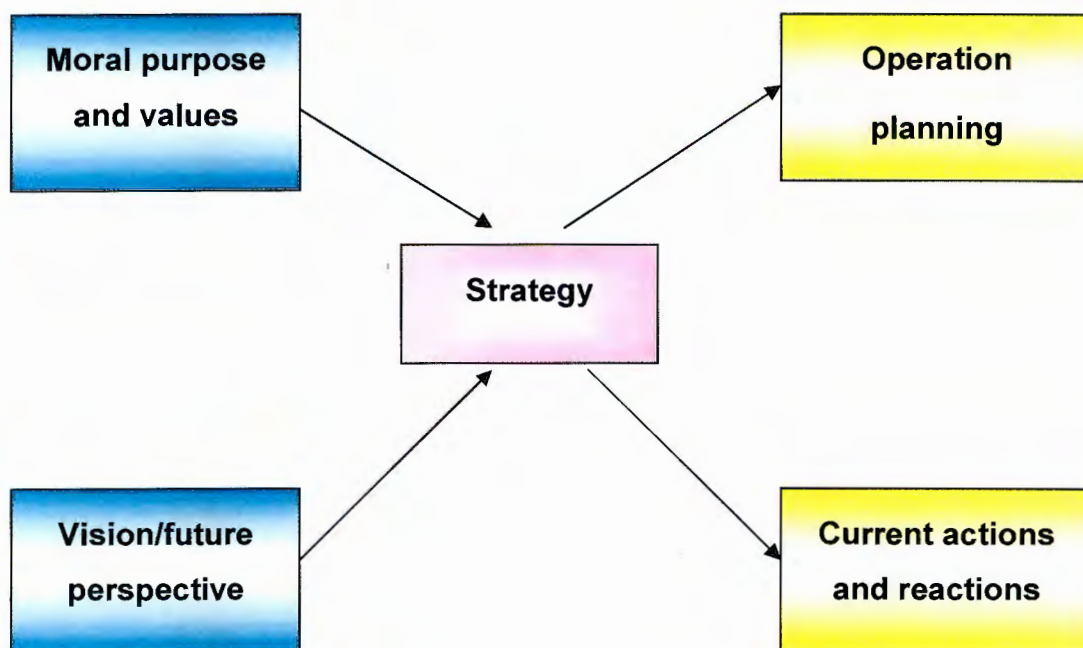
3.2.1 Direction setting

Davies (2009) states that a strategic leader sets a future direction framework for the organization and that the role of the strategy is to translate the moral purpose and the vision of the organization into reality.

It is this researcher's opinion that the principal must have a clear vision, a strong focus and a dream of what the school should ultimately achieve and this must be linked to the moral purpose of the school and the community. The community being served must identify with the moral purpose and they must see the vision as something worth striving for. For example, the vision of the school may read that: Striving for an inclusive school in which all learners in our community will be treated equally irrespective of talent or disability, for a renaissance of a new generation in South Africa.

The figure below illustrates the function of a strategy

Figure 3.1: The function of a strategy



The researcher understands the moral purpose, the value and vision as the elements that should be translated into strategies. The strategies provide ideas of what to put in plan of action and of course these will be actions being taken and reactions taken on the strategies that were formulated. Thus, the researcher's definition deduced from the above statement is that: Strategy is a translated plan of action deduced from the moral purpose, value and the vision of the school. Strategy brings about actions and re-actions in order that the vision of the school can be achieved. Within this context, effective and progressive Inclusive Education can become a reality.

In the light of the above, White Paper 6 on Inclusive Education (2001) proposes a progressive realistic strategy for a period of 20 years for its implementation in schools. The 20 years are broken down into immediate to short-term steps (2001-2003), medium-term steps (2004-2008) and long-term steps (2009-2021).

The following strategic steps to be taken during every stage have been stipulated by White Paper 6 on Inclusive Education (2001):

- **Short-term strategies (2001-2003)**

The implementation of the national advocacy and education program on Inclusive Education between 2001 and 2003, involved planning and implementing a targeted outreach programme, starting in Government's rural and urban development nodes to mobilise disabled out-of-school learners and youth. Thirty special schools were to be converted into special school resource centres in selected school districts. The plan was to be accomplished through the phases of designing, planning and implementing. On a progressive basis, systems and procedures were to be established in order to help with the identification and addressing of the barriers to learning in the Foundation Phase (Grade R-3) (DoE, 2001).

- **Medium-term strategies (2004-2008)**

Further education and training and higher education institutions were to transform so that they can be able to recognise and address the diverse range of learning needs, especially those of disabled learners. The targeted community outreach program from the base of Government's rural and urban development nodes were to be expanded, to include special schools/resource centres, full-service schools and district support teams (DoE, 2001).

- **Long-term strategies (2009-2021):**

The expansion of provision is expected to reach the target of 380 special schools/resource centres, 500 full service schools and colleges and district support teams and the estimated 280,000 out-of-school learners and youth (DoE, 2001).

Leaders in schools must define their organization's moral purpose, which can be stated as 'why we do what we do'. The values, which underpin the moral purpose of the school, are linked to the vision, which considers where the institution wants to be and what sort of organization is envisaged for the future. The strategies are ways of linking the broad activities to shorter-term operational planning, thereby inspiring or influencing the responses to immediate events with elements of the culture and value systems. Strategy gives the medium-term plan a sense of direction. Strategy is

about talking of marshalling resources and looking with a future perspective in order to achieve the maximum potential of an organization. Strategy involves how an institution is going to travel from the present point to the desired destination, what kind of structures will be put in place in the school, what measures will be taken to make it happen and how the money will be used (Fullan, 2005; Davies, 2009). A strategy according to Davies (2009:16) '...is a plan of action or conscious plan of action, that's taken in the light of the information that is available at the time. Strategy can take various forms. It is a mechanism for delivery on building the direction and the capacity of the organization to achieve that directional shift or change. For translation to take place, leaders in schools must proactively transform their mindsets and strive for something better'.

The researcher perceives the above explanation of strategy as crucial for the implementation of White Paper 6 on Inclusive Education. In South Africa, our past speaks of separatism; the cardinal point of changing our mindsets to think of inclusion is the first step towards what we are striving for as a better goal for a united future.

Davies (2009) outlines different ways of translating strategies into action:

- Strategies translating into action-strategy development and organizational processes.
- People and organizational alignment to the strategy.

These two points are discussed in the following paragraphs.

3.2.2 Strategies translating into action-strategy development and organizational processes

According to Davies (2009) there is a four-stage ABCD approach of translating strategy into action.

3.2.2.1 Articulation of the strategy

Articulation of the strategy takes place in three ways: oral articulation, written articulation and structural articulation. Leaders communicate, through talking and

conversational strategies, the strategic purpose and the direction of the organization. Written articulations are formal statements and plans that are clearly distinguishable from operational short-term plans. A structural articulation refers to the organizational infrastructure that supports and develops the strategic approach, for example setting-up structures or strategic meetings separate from the cycle of operational meetings (Knapp, Copland, & Talbert, 2003; Davies, 2009:17).

It is also important to *build* a common understanding of what is possible through shared understanding and images. Building stages entail envisioning a clear and an understandable picture of what the new way of operating would look like. The people in the school must be awakened to alternative perspectives and experiences and must agree that a continuation of the current way of working is inadequate if the school wants to be effective in future (Davies, 2009: 18).

Leadership must create a *shared conceptual or mental map* of the future through dialogue. Kaplan and Norton (Davies, 2009) argue that strategic leaders need to step back and articulate the main features of the current organization which they call 'strategic architecture' and must lead their members to define what the future of the school and new architecture might be. This might involve a process of enhancing participation and motivation to understand the necessity for change through strategic conversations. It mainly draws on high-quality information both from within and outside the organization, which is part of the strategic analysis that underpins dialogue.

The leadership of a school must define the *desired outcomes* and stages of achieving those outcomes, so that a clear picture of the new strategic architecture of the school may be established. According to Tichy and Sharman (1993, quoted by Brundrett and Deiring, 2006; Davies, 2009) this stage involves identifying series of projects that need to be done in order to move the organization from its current state. This statement agrees with the short-term strategies stated above for Inclusive Education. For the strategies to function effectively, we need educators to capture the vision and to be aligned to the strategy.

The researcher is of the opinion that articulation of the strategy is very important. Communicating the strategy, how and when the articulation is done are equally

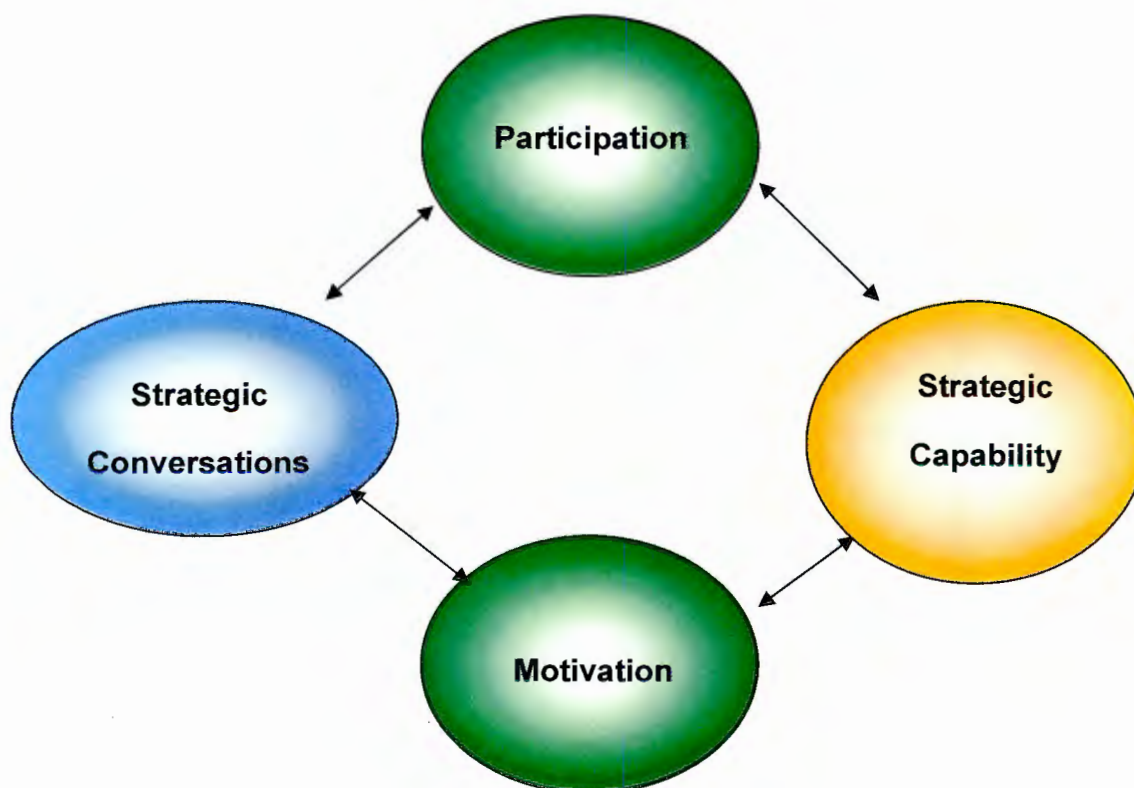
important. The leadership of a school must build momentum from the day of the unveiling of the strategy and the educators must be ready to act. Positive and negative reactions must be considered so that the strategy can be redefined and accepted by all if necessary.

3.2.3 People and organizational alignment to the strategy

According to Wilson (1997; Anderson-Levitt, 2003; Brundrett and Deiring, 2006) organizational change has two principle aspects namely, change in mission and strategy and change in culture and behaviour. It is impossible to change the mission and the strategy without changing the culture and the behaviour. Key to this is changing the mindsets and the behaviour of the people within the organization. The research interviews of Grundy (1998; Gratton, 2000; Kotter and Cohen, 2002) articulate a process based on strategic conversations, which built participation and motivation within the school in order to improve strategic capacity. It highlights the importance of aligning people in an organization.

This alignment process works in an interactive way as illustrated in figure 3.2.

Figure 3.2: The interactive nature of alignment and capacity



The researcher supports the above statement and wants to add that this will have maximum impact if the principal takes time to study the mindsets and behaviour of the educators so that the principal can be able to speak to the 'hearts' of the individual educators. Quinn (2004) points out that '...telling is not as effective in situations requiring significant behavioural change because it is based on a narrow cognitive view of human systems, it fails to incorporate values, attitudes and feelings'.

3.2.3.1 Strategic conversations

The development of strategic conversations and dialogue involves discussions about holistic whole-school issues and the trends that may face the school over the next few years. This is described by Hirschhorn (1997: 123-4); Van der Heijden (1996: 41-2) and Davies (2002: 21) as conversations that enable people to develop a strategic perspectives of what the school might become in the future.

The researcher perceives this statement to be crucial as the ideas that are communicated must be done in such a way that the staff members will buy-into it otherwise they will carry on with their business as usual. Inclusive Education must be properly disseminated. The Department of Education must train all school staff for inclusivity. In addition, the truth of Inclusive Education must be told as the truth will influence how staff will experience the concept Inclusive Education. For example, if you lost your legs today in an accident, you would like people to find a way of accommodating you. Sparks (2009) state that '...because emotions provide the passion and commitment that overcomes complacency and resistance to change, vivid stories, image and experiences are more powerful than research and analysis intended to offer logical reasons for change'.

3.2.3.2 Strategic participation

It might be a difficult and slow process to move from a previous state of being to a new state of being as projected in broader and longer-term strategic issues. This is a process of re-culturing the organization (Davies and Davies, 2009) through participation in discussions essential for the development of the organization's ability to build leadership in depth. The most significant ability is building on the involvement of all the members of staff in the longer-term development of the school.

Strategic organizations use the abilities and talents of wider staff groupings to involve everybody in building and committing to the strategic direction of the school (Roheiser, Fullan, and Edge, 2003; Davies and Davies, 2009).

The researcher thinks that Inclusive Education is everybody's business; it is not just for a compassionate few. All stakeholders in education must be involved to ensure that the new inclusive culture is ushered-in.

3.2.3.3 Strategic motivation

The development of a strategic cause in which individuals are motivated to contribute leads to improved effort and commitment. Gratton (2000) advocates developing 'emotional capabilities', 'trust-building capabilities' and capabilities to build a 'psychological contract' as a way of engaging and motivating staff. Building a commitment to values and long-term ambitions provides individuals with a vision and a sense of direction that allow them to put short-term challenges into context. Getting involved is much more significant than documentation.

The researcher's opinion is that inclusive schools have some learners whom they rejected and excluded by sending them to special schools, some learners were pushed-out or dropped-out of the system completely, but suddenly the same schools must welcome them back into the school. This requires tremendous effort and commitment from all stakeholders.

Conversational strategies and participation enhancement build greater personal and organizational capability and capacity, bearing in mind that the major resource of any organization is the quality of its human capacity. This means that enhancing quality should be the most important focus of the organization. It is necessary to differentiate between capability and capacity. Capacity is seen as the resource level that is available at any given moment to achieve an objective. Capability is looked at as a mix of skills and competencies possessed by the people in organizations which are needed to achieve the objectives (Davies, 2009). The right number of people may not, at a particular time, have the right skills. However, when they do it can be said that both capacity and capability are present. Boisot (1998: 5; Sparks, 2009; Deutschman, 2007) state that '...we shall use the term capability to depict a strategic

skill in the application and integration of competencies'. Determination of an effective intervention point means 'doing the right thing at the right time'.

Deciding *when* to make a significant strategic change is as critical to success as choosing *what* strategic changes to make. The issues of timing can rest on leadership intuition (Parikh, 1994) as much as on rational analysis. When individuals in the organization are ready for change, when the organization needs the change and when the external constraints and conditions force the change, all have to be balanced, one against the other. Such judgment is manifested in not only knowing *what* and knowing *how* but also knowing *when* (Boal & Hooijberg, 2001; Hargreaves & Goodman, 2004; Stoll, Fink & Earl, 2002) and, as important, knowing what not to do (Kaplan & Norton, 2001). Therefore, we could add to this list '...knowing what to give up or abandon in order to create capacity to undertake the new activity (Davies, 2009)'.

The researcher is of the opinion that at this stage in South Africa, there is a lack of capacity and capability as leaders, educators and parents need skills for effective implementation of Inclusive Education. The sooner we act on this the better; otherwise Inclusive Education will just be compassionate talk and will bear no fruit.

3.2.3.4 Strategic capabilities development

For the development of the school and for its sustainability in the long-term, the school needs to develop strategic capabilities. In the context of Inclusive Education, it will be important to develop a problem solving culture rather than a blaming culture and a culture of assessment for learning rather than assessment of learning. It is important to realise that creativity in problem solving and teamwork are necessary to create strategic capabilities. Pressure in delivering short-term targets before strategic capabilities are developed can lead to the postponement of longer-term more significant developments (Davies and Davies, 2009; Sparks, 2009; Deutschman, 2007).

3.3 CHARACTERISTICS OF A STRATEGIC LEADER

The research done by the National College for School Leadership (2003) established the characteristics of strategic leaders in schools as:

- Leaders who are dissatisfied or restless with the present situation.
- Leaders who prioritize their own strategic thinking and learning.
- Leaders who create mental models to frame their own understanding and practice.
- Leaders who have powerful personal and professional networks.

3.3.1 Leaders who are restless or dissatisfied with the present situation

Davies and Davies (2009) describe leaders who are dissatisfied with the present situation as having 'creative tension'. The creative tension emerges from seeing clearly, where one would like to be (the vision) and facing the truth about the current reality. These leaders have a vision of strategic leaps that the organization needs to make and act passionately for change.

The researcher's opinion is that South African principals should be restless about the state of Inclusive Education in schools. We cannot afford to continue with discrimination against learners who experience barriers to learning in the classroom.

3.3.2 Leaders who prioritise their strategic thinking and learning

Strategic leaders focus on their own learning and stress the importance of new knowledge to promote strategic direction for the school. For the development of creative schools leaders need to stress the importance of new knowledge in order to promote the strategic direction for the school (Davies & Davies, 2009).

The researchers is of the opinion that much as we are prone to segregating because of the past, we can learn to be inclusive in the school. Deutschman (2007:217) reminds us that '...new habits are particularly fragile and require supportive environments, even while we are creating new 'neural pathways' the old ones are still there in our brains. Until the new ones become completely second nature, then stress or fear can make us fall back on the old ones'. Sparks (2009) concludes that a '... powerful way to create new habits is to integrate 'doing' into the learning process whenever possible'.

3.3.3 Leaders who create mental models to frame their understanding and practice

Strategic leaders make sense of the complexity of the schools by creating mental models and frameworks to aid their understanding. They also stress the importance of having a theoretical model to support strategic development and the importance of sharing that model with others in the organization (Davies & Davies, 2009). Sparks (2009) states that '...leaders create new conceptual frames or mental models for themselves and others that enable continuous improvements in teaching, learning and relationships'.

3.3.4 Leaders who have professional and powerful personal networks

Strategic leaders are always scanning the environment: locally, regionally and internationally. Their passion is to develop new ideas and to benchmark current practices in their schools with those of schools in the wider educational community. They have the ability to develop personal and professional networks that provide an alternative perspective from those prevalent in their immediate educational environment (Deutschman, 2007; Davies & Davies, 2009).

The researcher is of the opinion that Inclusive Education is not a one-person show. It requires everybody to be involved at all different levels. These include the local community, Non-Governmental Organizations, the Department of Education, Senior Management Teams, educators and parents. Sparks (2009) supports this argument by adding that '...through teamwork, leaders cultivate relationships that offer hope, provide encouragement and support in the acquisition of new practices and stimulate new ways of thinking about teaching and learning'.

Based on the significant perspectives drawn from Gardner's (1999) notion of multiple intelligences, a definition of strategic leadership should be based on a conceptualisation of strategic intelligence, summarised as three types of wisdom:

- People wisdom.
- Wisdom in context.
- Wisdom in procedure.

3.3.4.1 People wisdom

Sparks (2009) defines people wisdom as '...having a vision that is shared with people within an organization to involve and energise staff to deliver the strategy'. Visioning is a process which requires interpersonal intelligence (Gardener, 1999). Strategic leaders identify the concerns and feelings of the people in the organization. Involving and enabling people to participate is the key to the strategic process. It is essential to motivate people and to work co-operatively with them. People are involved in different degrees but it is important that everybody gets involved: staff, parents, learners and the local community. People must be empowered in their ability to take part in strategic thinking and actions (Deutschman, 2007; Sparks, 2009).

3.3.4.2 Wisdom in context

Strategic leaders must understand both the historical and current living experiences in the school for them to set a clear sense of purpose. Davies (2004) refers to contextual wisdom as strategic intelligence. This form of intelligence gives the strategic leader the capacity to see the school in relation to the wider community and the educational world. Strategic leaders have the contextual wisdom to respond to new ideas and events and have the ability to listen to others. Contextual wisdom makes them understand the uniqueness of a particular school environment. In other words, contextual wisdom involves understanding and developing culture, sharing values and beliefs, developing networks and understanding the external environment (Deutschman, 2007; Sparks, 2009).

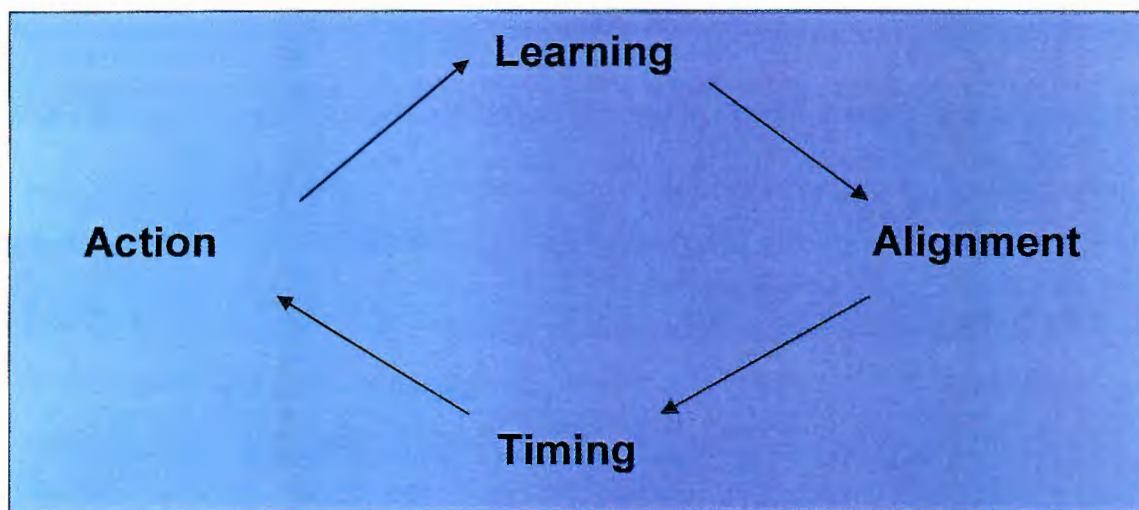
The researcher's opinion is that understanding the environment in which the leaders find themselves as Inclusive Education requires the development of a new culture and the sharing of new values and beliefs. It also requires well-managed networks and a good understanding of the external environment.

3.3.4.3 Procedural wisdom

This type of wisdom focuses on a strategic learning cycle. This enables the appropriate choice of strategic approaches and strategic processes. The strategic learning cycle highlights the strategic leaders' ability to harness the abilities of

others. Strategic leaders have the inner courage to drive the organization forward towards the desired future (Davies, 2004; Farkas *et al.*, 2004; Deutschman, 2007; Sparks, 2009). According to this model, driving the organization forward depends on a cycle of learning, aligning, timing and acting as illustrated in Figure 3.7.

Figure 3.3: The strategic learning cycle



This model is based on the notion that if we can change processes, we can change mindsets and values. People must be involved in every aspect of the school in order to have a strategic focus. The role of the strategic leader is to create an urgency and momentum for organizational learning, imaginative and broad thinking.

The researcher is of the opinion that the Strategic Leadership model is a model to be considered for schools that need to embark on the development of eco-systemic management strategies for inclusive schools.

In the following paragraphs, the ecological leadership model will be discussed.

3.4 THE ECOLOGICAL LEADERSHIP MODEL

According to the researcher an understanding of ecological issues within the school, the Department of Education or even the education system as a whole is necessary so that we can embrace the 'socio-cultural context' and unique forces existing in and around the communities in which schools are situated. Steiner-Khamsi (2004), Anderson-Levitt (2003, 2004); and Bartlett (2003) support this idea. Bottery (2004) supports this view as he states that these forces are beyond the schools control and

therefore, leadership must be 'ecologically aware' of the forces affecting upon, not just their own practice, but also on the attitudes and values of educators, learners and the wider communities that they serve. Leaders need to place their practice within meso- and macro-contexts. Bottery (2004) states that due to the current pressures on educational practice, educational leaders need to embrace the following:

- Ecological and political awareness so that it extends beyond the institution to the local community, the nation, and the globe. With respect to Inclusive Education, the researcher is of the opinion that the leaders must be aware of the fact that inclusivity has become a global movement (cf. 2.2).
- Engage in the notion of public good, drawing people beyond the personal and making think of their communities and its learners' education.
- Reflexive and proactive approaches to a rich and extended version of accountability.
- Building elected representatives with professional and non-professionals to develop extended partnerships not only to improve professional practice, but the society in general.
- Building a theory of knowledge with regard to methods, validity and scope, not only as a reflection of humility in such partnership, but also as a counterweight to absolutist and relativist views. The absolutist makes us aware that there is a universal standard of truth; what is true or false depends on what the facts are, not on what individuals or societies believe to be true. Relativist views are those that make us aware that there is no universal standard of truth; what is true or false depends on what individuals or societies believe to be true.
- Being constantly self-reflective on their profession as an interrogation and understanding of practice within larger contexts (Bottery, 2004).

Ackerman and Maslin-Ostrowski (2002) and Bottery (2004) further argue that not enough attention is given to the policy and economy context within which educational leadership is practised. Wright (2001, quoted by Bottery, 2004) agrees with this

position and argues that the economic and political climate effectively reduce the ability of school principals and other educational leaders to transcend matters of government policy and that their own values and preferred practice are being submerged beneath a deluge of managerial rhetoric, paperwork and legislated practice.

The researcher agrees with the above statement because in South African schools the stakeholders are submerged with a lot of paperwork and legislated practice that sometimes acquire more time for doing administration work than for teaching learners in the classroom. However, true leadership emerges in times of crisis (Ackerman & Ostrowski-Maslin, 2002)

With regard to the leadership requirements detailed above, it is important to examine other types of leadership models that speak to Inclusive Education to see how such models respond to the pressures and how well such models incorporate the requirements listed above. The following models will be discussed:

- The moral community leader model
- The ethical dialectician model.

3.5 THE MORAL COMMUNITY LEADER MODEL

Sergiovanni (1996, quoted by Bottery, 2004) calls a moral community leader a servant leader. This type of leader sees the school as a community embraces and reflects back the core educational and moral values of that community. The researcher's opinion is that moral community leadership is appropriate for the implementation of Inclusive Education.

The definition of school life in this context could be a 'public celebration of values'. Moral leaders help with the challenges that define education and moral values of the community. Sergiovanni (1996; Sparks, 2009; Deutschman, 2007) argues that for the school to work well, theories of leadership that recognise that parents, educators, administrators and learners need to sacrifice their needs for causes that they believe in.

People who hold the same educational and moral values as school principal will experience that they have leaders who articulate what they see as good education. These communities will have members who are empowered and committed, because they will feel that they are supported by someone who thinks and feels the same way that they do. Such schools and communities are likely to be highly focused and will have a high self-esteem which will result in high academic standards and good results (Bryk *et al.*, 1996; Bryk and Schneider, 2002).

The researcher agrees with the above statement and wants to state that we cannot talk about inclusivity without realising that we all have to sacrifice in order to achieve the communities' moral objectives of accommodating all its learners into their local schools. This leadership model is applicable to current educational policy demands in South Africa, especially the Inclusive Education policy.

3.6 THE ETHICAL DIALECTICIAN MODEL

An ethical dialectician is a leader who has an internal compass. These leaders know who they are and they do confront a challenge by trying to work out what other people think that they should do, but they do so with a particular moral stance. However, ethical dialecticians do not drive their own vision without respect for other people's views. They are sufficiently aware of the ecological complexity of the external world and their personal epistemology limitations, and also know that they need to listen to others. They adopt a 'provisionalist' attitude towards the world (Bottery, 2004; Deutschman, 2007).

The ethical dialectician moves from thesis to antithesis to synthesis, but when conditions change, or as they understand the wider picture, their synthesis may be challenged. This engages them in the process of dialectics once more. In other words, they must engage in another system of reasoning to arrive at the truth by exchanging logical arguments. This may mean much more work than simply forcing through their own, or a government's vision. These leaders are willing to put in time to forge joint visions and to develop these visions into working realities (Bottery, 2004; Deutschman, 2007).

The researcher is of the opinion that for the inclusive vision to be realised, there must be dialectics. Bottery (2004) and Deutschman (2007) also support this

argument. Bottery (2004) argues that a principled moral vision is needed for an educational leader and a process of moral dialectic is equally important. Unfortunately, the current policies of control as well as demands from the society create intense pressures, enough to prevent the full development of the ethical dialectician model of leadership. He suggests a policy orientation that acknowledges the necessity for leaders to start from an ethical centred model in order to deal with the particular contexts of educational problems (Deutschman, 2007).

Should the leadership of educational organizations and in particular that of schools, be embedded within the networks of regional, national and global policy making, then acceptable and practical forms of leadership need to interrogate such policy making. A leader of a value-driven and essentially moral organization needs to ask awkward questions about the policy networks that facilitate, constrain or direct the context of education (Bottery, 2004; Deutschman, 2007; Sparks, 2009).

Ethical dialecticians recognise the need for educational organizations to engage in national endeavours delineated and organized by the government of the day but also take cognisance that they have a responsibility to do much more than this. Educational leaders need to help individuals look into themselves, to stand back from the demands of everyday life to reflect upon the way the current circumstances and problems provide new insights into which they are, into the nature of their morality, and into how values have fashioned and shaped such realities to provide personal meaning to their lives. They have to transcend the personal to be able to reflect on their relationships with others, on their rights, on their responsibilities to others, communities and the global society (Bottery, 2004; Deutschman, 2007; Sparks, 2009).

Deutschman (2007) offers three linked elements that he calls, 'relate, repeat, reframe'. In 'relate', he emphasizes the importance of having sustained relationships with individuals and groups that inspire and sustain hope and provide support. 'Repeat' underpins the importance of learning, practicing and mastering new skills until they become habitual. 'Reframe' means to acquire new ways of thinking about a situation.

The discussion up to this point made it clear that schools must change in order to function effectively in inclusive settings. Therefore, the transformational leadership model will be discussed in the next paragraphs.

3.7 THE TRANSFORMATIONAL LEADERSHIP MODEL

Transformation is a marked change in appearance or character. In South Africa schools need to transform to be able to effectively implement White Paper 6 on Inclusive Education. According to studies done by Leithwood and Jantzi (2009), transformational leadership does not depend on charismatic practices or leadership characteristics but rather on acknowledging the interdependent relationships among leadership and managerial activities. Transformation works toward the creation of partnerships between the school and the parents and members of the community as co-producers of learners' learning (Shields, 2003; Leithwood & Jantzi, 2009).

Leithwood and Jantzi (2009) and Shields (2003) state that the transformational leadership model consists of three broad categories of leadership practices and each of these categories consist of practices that are specific because individual school contexts require discretion and adaptation on the parts of leaders for them to be successful. Transformational leaders are engaged in setting directions, developing people and redesigning the organization.

The researcher is of the opinion that mainstream schools must transform to be become inclusive schools. The process of transformation will require that a new direction is set for these schools. For example, changes in infrastructure: from staircases to ramps and wheelchair friendly structures to help accommodate learners with physical disabilities. The Department of Education must empower school staff by training them to understand diversity and by equipping them with skills needed for effective teaching and learning in diverse classrooms. The critical aspect of transformational leadership is helping members of staff to develop a shared understanding of the school and its activities as well as the goals that underpin a sense of purpose or vision.

3.7.1 Developing people

Clear and compelling organizational direction is an important contributor to work-related motivation. Capacities and motivation are influenced by the direct experiences that organizational members have with the people in leadership roles as well as with their own work. According to McColl-Kennedy and Anderson, (2002) the ability to engage in such practices partly depends on leaders' knowledge of what is required to improve the quality of teaching and learning. This ability is often described as 'instructional leadership', and it is part of the leaders' emotional intelligence. This sort of intelligence shows through personal attention devoted by a leader to an employee and the use of employee's capacities to increase performance. They offer intellectual stimulation, provide individualized support and are appropriate role models.

The researcher is of the opinion that the stakeholders of schools are functioning at different levels. Therefore, staff development will require the staff to engage in activities that focus on skills development. The role of the Department of Education is to provide for the necessary skills development so that individual educators requiring specific skills can be empowered. The principal must also be involved, not just to support the educators but for personal development as well. Principals must be trained and supported as without training and support, they become managerial functionaries instead of inspirational instructional leaders.

3.7.2 Redesigning the organization

Transformational leaders ensure sustainability and support measures for the performance of administrators, educators and learners. This practice acknowledges the importance of collective or organizational learning and the building of professional learning communities as key contributors to educators and learners' learning. The assumption is that the purpose behind the organizational culture and structures is to facilitate the work of organizational members and that the malleability of structures should match the changing nature of the school's improvement agenda. There are specific practices typically associated with this category that include: strengthening district and school cultures, modifying organizational structures to foster culture building and creating collaborating process to ensure broad

participation in decision-making. These practices include the ongoing refinement of both routine and non-routine administrative processes (McColl-Kennedy & Anderson, 2002; Shields, 2003; Fullan, 2005; Wheatley, 2006; Senge, 2006).

The researcher is of the opinion that the above statement is applicable to the implementation of Inclusive Education, in the sense that there is a need for refining and redefining of all processes to bring about sustainability and support measures to all stakeholders in the learning community.

However, the school must have an inviting culture so that the community at large can be given a platform to provide services to the school. The following paragraphs will deal with invitational leadership.

3.8 INVITATIONAL LEADERSHIP

Novak (2009) defines invitational leadership as an attempt to focus an educator's desires, understanding and actions in order to create a total school environment that appreciates individuals in their uniqueness and calls forth their potential'. This type of leadership is built on the guiding ideal that education is fundamentally an imaginative act of hope and that hope is communicated through persistent, resourceful and courageous practice. The role of invitational leaders is to encourage the improvement of systems and to extend the context in which imaginative acts of hope thrive. For this to happen, these leaders work from a theory practice of self-corrective, interrelated foundations, assumptions, concepts, strategies and insights about what matters in education and how that can be brought about inside and outside of schools (Quinn, 2004; Sparks, 2009).

The researcher wants to argue that in Inclusive Education leaders must strive ensure that individual educators maximise their potential through encouragement. There should be systems within and outside the schools that can offer encouragement when educators in an inclusive school setting, for example, feel that they are wasting their time by offering learner support to a learner with learning disabilities.

Novak (2009) states that schools are complex message systems that should continually inform people of their worth, ability and self-directing powers. This form of leadership is part of larger ethical projects that aim at constructing messages that

cordially, consistently and creatively summons all people to realize more of their social, intellectual, emotional, moral and creative potential. This approach is called an inviting approach and involves an interrelated set of foundations and assumptions (Quinn, 2004; Sparks, 2009).

3.8.1 Foundations

Novak (2009) highlights the following as the foundations of invitational education which provides the needed support:

- Ethos of democracy: This requires an ethical and political commitment to the idea that all people matter and share the right to participate meaningfully.
- Perceptual tradition: This is a psychological perception that takes a democratic ethos by focusing on how things are seen from the point of view of the person.
- Theory of self-concept: This view is based on the perceptual tradition that all people are internally matured to maintain, protect and enhance their sense of who they are and how they connect with the world.
- Educational living goal: This ideal aims at people who are able to understand their individual and collective experiences.

The researcher is of the opinion that foundations emphasize the fact that education for a democratic society consists of intentional and sustained practices that attend to each individual's perspective, motivation and the need for enabling aesthetic cognitive and ethical experiences. For example, for Inclusive Education to function effectively, educators must be motivated to practice Inclusive Education. When this is not the case educators can choose to turn a blind eye on the policy and can decide to carry on 'school business as usual'. In the light of this statement, theoretical base invitational educators develop working assumptions about 'what people are' and 'how they are to be treated'.

3.8.2 Assumptions

Novak (2009) explains assumptions as branches of foundations in the sense that they reach out and carry more life. Assumptions are expressed in terms of respect, trust, care, optimism and are manifested in an inviting stance:

- Respecting people: people are valuable, able and responsible and should be treated in a way that acknowledges and extends their worth, talents and abilities.
- Putting trust in people: Education is a co-operative, collaborative activity where mutuality is enhanced.
- Caring for people: It is essential to be optimistic about the people that you are working with. People have untapped and unknown potential in all areas of human endeavour.
- Intentions: People have potential that can be realized best by places, policies, processes and programs designed to invite development and are done by people who are personally and professionally inviting themselves and others (Novak, 2009).

An invitation is defined as the summary of the content of messages communicated verbally, non-verbally, formally and informally through people, places, policies, programmes and processes. Inviting messages tell people that they are valuable, able and responsible. Invitational leaders have a perspective of addressing, evaluating and modifying the total school environment. Heifetz and Linsky (2002) add that '...the power of a sacred heart helps mobilize others to do the same to face challenges that demand courage and to endure the pains of change without deceiving themselves or running away'.

The following paragraphs will deal with the kind of management that the researcher perceives as suitable for managing inclusive schools.

3.9 EDUCATIONAL MANAGEMENT

According to Bush and Glover (2003) educational management is a field of study and practice which is concerned with the operation of educational organizations. The

field of management studies is characterized by considerable flexibility of discipline boundaries because it draws on several disciplines such as sociology, political science, economics and general management. Bush (2007) states that management is an activity involving responsibility for getting things done through other people. Management is also perceived as a set of activities directed towards efficient and effective utilization of organizational goals (Sapre, 2002).

The researcher is of the opinion that in the case of new global policies and in particular, the policy on Inclusive Education, the principals and governors of educational institutions need to develop new strategies for the management of responsibilities that are imposed on schools. The type of management required must be compatible with inclusivity. The management models that the researcher perceives as appropriate for implementing Inclusive Education are the 'collegial' and 'bureaucracy' models. These models will be discussed in the next section.

3.9.1 Collegial model

The collegial model for educational management includes theories emphasizing that all members of an organization should contribute to decision-making. These approaches range from the leader sharing power with a limited number of senior colleagues' (restricted collegiality), to all members having equal voices in determining policy. Bush (2003) defines this perspective as a model in which organizations determine policy and make decisions through a process of discussion leading to consensus. Power in the organization is shared among some or all members of the organization who have a mutual understanding of the objectives of the institutions (Wheatly, 2006; Diamond, 2001; Schmoker, 2006; Magno, 2009).

The collegial management model has a normative orientation and it is based on agreement. In other words, no school policies or rules are passed until the staff members agree on them (Bush, 1995, 2003; Ackerman & Ostrowski-Maslin, 2002; Magno, 2009).

The researcher is of the opinion that if the school management does not sell the inclusive vision well enough in order for the educators to agree with it, chances are that the vision will not be achieved.

The major features of the collegial model are:

- Authority of expertise.
- Common set of values.
- The size of decision-making groups.
- Consensus.

3.9.1.1 Authority of expertise

The collegial model seems appropriate for schools which have a significant number of staff with particular specializations in specific fields. The collegial model assumes that those professionals have the right to share in the wider decision making processes. The extension of the dominant professional ethics to the administration of a large organization implies that their status grants them the right to be respected and consulted (Bush, 1995, 2003; Magno, 2009).

The researcher supports the above statement and adds to this that for the experts to participate effectively in inclusive schools consultation must be done with all the respective experts. For example, if an inclusive school accepts a learner with multiple disabilities, all the stakeholders must be made aware of it so that the lesson preparations can be done to suit the learning needs of such a learner.

3.9.1.2 Common set of values

In the collegial model the members hold a common set of values. The common values guide the managerial activities of the organization, in particular those that are lead by the educational goals (Bush, 1995, 2003; Magno, 2009).

The researcher is of the opinion that the principal must be aware that the staff in the school may share common sets of values but must also know how to introduce new policies in the school. For example, some educators may belong to the same church, trained in the same college, went to the same high school, thus they have strong bonds and ignoring anyone of these might cause resistance towards change.

3.9.1.3 The size of decision-making groups

In the collegial model the size of the decision making group is an important element. Power is shared with staff in a democratic way rather than the power being held solely by the principal of the school (Bush, 1995, 2003; Ackerman, & Maslin-Ostrowski, 2002; Magno, 2009).

The researcher is of the opinion that an inclusive school requires a democratic management style rather than a dictatorial style of making decisions. If the voice of educators is not heard they will carry on with 'business as usual'.

3.9.1.4 Consensus

Instead of making decisions through conflict and division, the collegial model assumes decision making through consensus. Common values and shared objectives lead to the view that it is desirable and possible to resolve problems by agreement. Consensus underlines the importance and widespread feelings that with respect to major policy decisions, no simple majority system can successfully be operated (Bush, 1995, 2003; Ackerman & Ostrowski-Maslin, 2002; Magno, 2009).

The researcher is of the opinion that the five features of the collegial model are important for schools of Inclusive Education. Consultations must be done with all the experts in schools and consensus must be reached regarding shared values in embracing the Inclusive Education policy.

However, for efficiency and effectiveness, the bureaucratic model will be appropriate for Inclusive Education because through these studies the researcher realized that Inclusive Education also requires a precise, stable and a reliable model.

3.9.2 Bureaucratic model

Bush (2003) states that the bureaucratic management model is often used when referring to generics of formal organizations; from a technical point of view, it is capable of attaining the highest degree of efficiency and is in this perspective the most rational means of carrying out control over human beings. It is superior to any other forms in precision, in stability, in the stringency of its discipline and in its reliability.

Bureaucracy is a form of organizing which seeks for maximum efficiency through rational approaches to management. The main features of the bureaucratic model are as follows:

- Hierarchical authority structure
- Goal orientation of the organization
- Division of labour
- Rules and regulations
- Impersonal relationships
- Merit

In the following paragraphs, the main features of the bureaucratic management model will be discussed.

3.9.2.1 Hierarchical authority structure

This bureaucratic management model stresses the importance of hierarchical authority structures that involve a chain of command between the different positions in the hierarchy of the organization. This is a pyramid structure based on the legal authority vested in the officers who hold positions in the chain of command. In schools, for example, the educators are accountable to the principal of the school (Bush, 2003; Magno, 2009).

3.9.2.2 Goal orientation of the organization

This bureaucratic model emphasizes goal orientation within the organization. Schools are dedicated to achieving goals set by their principals. In this model members work towards a common goal designed by the legitimate leader by the virtue of the authority such leader holds at that particular time (Bush, 2003; Magno, 2009).

3.9.2.3 Division of labour

This management model suggests that division of labour must be done according to specialization. Universities and secondary schools clearly portray the picture of the bureaucracy model (Bush, 2003; Magno, 2009).

3.9.2.4 Rules and regulations

In the bureaucratic model decisions and behaviour are governed by rules and regulations, rather than by personal initiatives. The regulations ensure a high degree of uniformity of operation; structures make the coordination of various activities possible, even if there is a change in personnel and this promotes stability (Bush, 2003; Magno, 2009).

3.9.2.5 Impersonal relationships

The bureaucracy management model emphasises impersonal relationships between staff and clients. For example, in schools educators are addressed as “miss” and “sir” to promote impersonal relationships between the educators and the learners to minimize the impact of individuality on decision-making (Bush, 2003; Magno, 2009).

3.9.2.6 Merit

In this management model recruitment and career progress of staff are determined on merit. Appointments are made based on qualifications and experience. Promotion depends on expertise demonstrated in present and previous positions through laid down procedures. However, internal promotions in schools depend on the recommendation of the principal of the school. Sometimes there is no formal process in internal promotions (Bush, 2003; Magno, 2009).

3.9.3 The application of the bureaucracy management module to education

Schools have bureaucratic features, including a hierarchical structure with the principal at the top of the pyramid. The educators specialize in their specific subjects. Rules are set for the learners and the educators work according to the timetable. The principal is accountable to the governing body and external stakeholders regarding the activities of the school (Bush, 2003; Magno, 2009).

The researcher is of the opinion that for the implementation of the Inclusive Education policy, schools need to also consider the merits of the bureaucracy management model in order that the hierarchical structures of the school can be maintained and that the smooth running of the organization can be enhanced through respecting the hierarchy in the school.

3.10 CONCLUSION

This chapter discusses the role of strategic leadership and management in the implementation of the Inclusive Education policy. There is a growing recognition in many parts of the world, including South Africa, that schools require effective leadership and management if they are to provide the best possible education for 'all' their learners. Leadership and management models that the researcher found appropriate for the implementation of inclusive education as propounded in White Paper 6, are discussed. These included: strategic leadership, ecological leadership, transformational leadership, invitational leadership, political leadership, bureaucratic management, collegial management and political management (*cf.* 3.1).

Chapter Four focuses on the empirical research design, the methodology of the study and related issues.