# CHAPTER 1

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# CHAPTER 1
## LOGIC
Management strategies for effective social justice practice in schools

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# CHAPTER 1
# Orientation

## 1.1    INTRODUCTION

The first chapter of this research provides an orientation to the research problem - management strategies for effective social justice in schools. The problem statement will be put forward, followed by a review of the relevant literature, a discussion of the purpose and the four research aims. The research approach, design and methodology will be dealt with in a discussion of the research paradigm, the literature study and the research methodology. The theoretical study will be guided by a hermeneutic-phenomenological paradigm that will utilise a qualitative, constructivist-grounded theory research design during the empirical phase. The division of chapters and the ethical aspects will also be outlined. Lastly, a discussion of the contribution and value of the research to the body of knowledge in education management will be put forward.

## 1.2    GENERAL PROBLEM STATEMENT

### 1.2.1    Problem question

This research focused on the following problem statement: **What management strategies can be developed and used to advance effective social justice practice in schools?**

### 1.2.2    Rationale and justification

Social justice is deemed to have the notion of movement towards a socially just world steeped in the values of human rights, human dignity and equality, to which, adhering to the natural law that all people, irrespective of belief or societal disposition, are entitled (BusinessDictionary.com, 2008; South Africa, 1996a). It is evident from international and national media reports on the dire situation in many schools that this movement towards social justice remains unfulfilled. Correspondingly, a lack of management strategies enhancing a neo-education value system of social justice that will restore human dignity, equality and fairness, still does not exist.

Internationally the scholarship of a movement known as the "renaissance of social justice" is flourishing. At the annual AERA conference (2009:439) during April 2009 in San Diego, USA, no less than a hundred-and-thirty-eight papers on social justice were presented. Themes that were closely related to the concept of social justice included black education (46); Hispanic/Latino education (59), citizenship (41), critical race theory (86), diversity (104), equity (294) and multicultural education (80). In fact AERA considers social justice as crucial, as is evident from

their social justice mission statement which focuses on diversity, inclusivity, access and opportunity, research aims conducive to social justice praxis and the dissemination and promotion of the use of research knowledge related to education (American Educational Research Association (AERA), 2012).

Another consideration is the expanding interest in the research field of constructivist-grounded theory that focuses primarily on research that will yield a deeper understanding of the qualitative data (Marshall & Rossman, 2011:91). Issues of social justice and leadership development will also inform a transformative paradigm (Mertens, 2007:212, 213; Mertens, 2009:2) that has both the potential to provide a metaphysical umbrella for critical theories and to enhance the human rights agenda.

The preamble to the South African Constitution (South Africa, 1996a) states that South Africa should be "united in our diversity" to "… establish a society based on democratic values, social justice and fundamental human rights" in order to create a "quality of life of all citizens and free the potential of each person." With regard to education, though, it seems as if we are lagging behind our international counterparts who identified social justice as a new anchor for the entire educational profession, fostering servant and moral leadership (Brown, 2004:80; Mentz & Van der Walt, 2006:151; Department of Education, 1995).

From an in-depth appraisal of Internet search engines and electronic databases it became apparent that social justice as a field of enquiry is still not fully developed and that South Africans, in particular, do not yet share to the fullest degree in this renaissance (Shoho *et al.*, 2005:47) of social justice that, according to Marshall and Oliva (2010:12) may be poised to become a revolution. This lack of endeavours in social justice research in South Africa is furthermore evident if one considers that the South African education system is not upholding the Statutes that bind all those involved in education. If one considers the legal imperative of the Constitutional right to education, s.29 (South Africa, 1996a), read together with the preamble of the Constitution, the preamble of the South African Schools Act (SASA) (South Africa, 1996c), and the National Education Policy Act (NEPA) (South Africa, 1996b), it would seem that the school system is currently not redressing "past injustices in educational provision". Furthermore the system is not providing "an education of progressively high quality for all learners"; not laying "a strong foundation for the development of all our people's talents and capabilities"; not advancing "the democratic transformation of society", nor combating "racism and sexism and all other forms of unfair discrimination and intolerance." Moreover, it would seem as if the education system at large is not contributing "to the eradication of poverty and the economic well-being of society", nor protecting and advancing "our diverse cultures and languages", and that it may also not be upholding "the rights of all learners, parents and educators."

Realising this legislative framework requires effective leadership by people who are embracing a transformational journey (Blanchard, *et al.* 2007:87). They argue that situational leadership is

an integrated concept, which is about individual leadership, team-leadership, organisational leadership, and self-leadership. This notion is substantiated by LaFollette's (2007:3) statement that most actions do not simply concern us; rather our actions also concern others in a myriad of ways. He continues to argue that in deliberately choosing certain actions, whether directly or indirectly, the actions are about a choice to pursue self-interest or the interests of others. Being aware of this choice is about setting the arena in which morality operates, morality that is exclusively about behaviour (management strategies) that affects others (LaFollette, 2007:4). Ramphele (2012:11) argues that the South African society needs to have conversations with sons and daughters on the values of the constitution; the large gaps between values and practice; the rebirth of society, and the course of a transformational journey that is generational, political and socio-economical. Van der Westhuizen, PC (personal communication, May 1, 2011) emphasises that the transformational journey in education is about new approaches to education management. He states total management in accordance with the TQM approach, emphasis on values, organisational culture and quality of work life within a motivational organisation climate; and inclusivity which is enabling and not enslaving. He believes that educational leaders have to have both management as well as leadership abilities and quotes Covey's statement that it is important to manage from the left and lead from the right.

With regard to these introductory remarks that were made with regard to providing a rationale for and justification of this research and the subsequent literature review (Chapters Two and Three), the focus and intellectual question of this research may be phrased in the following manner: **How can management strategies assist in building a community of effective social justice practice in schools?**

A brief review of the relevant literature will follow in an effort to clarify the problem question, rationale and justification, and the research questions.

## 1.3    REVIEW OF THE RELEVANT LITERATURE

Social justice, as field of research, first emerged in the literature in the late 1980s (albeit initially linked to Protestantism and Catholicism of the mid-1800s). It became part of the discourse in education management since the dawn of the new millennium. Nationally and internationally it seems as if the different emphases on social justice applied to specific groups and/or particular concepts of social justice, and social injustices can be called the scholarship of social justice (Owens, 2009:477). Scholars of social justice are, however, still struggling to find an encompassing definition for the concept. The literature study has revealed that it is primarily a social concept, essentially difficult to capture, and politically burdened with numerous interpretations (Shoho *et al.*, 2005:48) and differing accents (Marshall & Oliva, 2010:5-6) within different contexts. With respect to education management and associated management strategies, Shoho *et al.* (2005:47, 48), affirm the lack of agreement of a conceptual definition of

social justice that has often lead to exclusionist and opposing viewpoints with regard to its management.

The notion of justice is one of the key features of any morally mature society and includes concepts such as moral aptness, a virtue based on ethics, rationality, law, fairness and equity, founded in legal action. This 'legal' term has, however, been expanded to include the notion of social justice which forms the primary focus of this research. Social justice, in this sense, does not reflect a punitive kind of justice. If anything, it reflects a restorative one - one that recognises that justice *per se* is social, not created by the politics of state-making, but by the acts of the virtuous and righteous individual (Novak, 2000). Words associated with social justice include value-based and virtuous, ethical and moral reasoning (Dotger & Theoharis, 2008; Novak, 2000). These concepts are closely linked to John Rawls's (1996:xlv) theory of justice as fairness. Justice as fairness is viewed as a relational associative concept for post-modern educational organisations which requires a contractual, relational and associative sense of belonging which is dependent on a moral duty to social justice (Givarian & Dindar Farkoush, 2012). The question, however, remains: "Why does justice as fairness not prevail in the relationships between educators and learners, educators and educators, and between learners and learners in our schools?"

Since the endeavour to create a socially just, neo-educational environment presupposes the existence of a reality that opposes social injustice, the researcher has to identify good social justice determinants prior to attempting the determination of appropriate management strategies. In contemplating a socially just neo-educational system, the reasons for the lack of social justice in schools (Rawls, 1996:14) need to be scrutinised. This begs the question: "Which management strategies can be developed to create a sustainable social justice environment in schools with the purpose of recreating education's responsibility to strive and struggle for a better world, even when it seems an unattainable goal?" (Efron, 2008:39).

This research is framed by Rawls's (1971:5) social-justice-as-fairness paradigm and includes the following categories: commutative justice (fairness of mutual agreements), retributive justice (just punishment), contributive justice (individualised responsibility contributing to freedom and dignity of others), and distributive justice (access to information). These four categories - fairness, justness, freedom and dignity, and access - are still dominating the discourse of what constitutes social justice and social injustice. In addition to these four categories, a fifth category, prospective justice (a justice of hope), is emerging in the literature (Efron, 2008:43; Thrupp & Tomlinson, 2005:549). At the heart of social justice is a pedagogical vision and belief that children are humanity's only hope and transforming the world means that education needs to be mended too (Efron, 2008:43). This quest is what Thrupp and Tomlinson (2005:549) call "a complex hope."

From the review of the available body of scholarship, it became clear that social justice as fairness paradigm is not evident in South African schools or in schools elsewhere. The first category, namely commutative justice as a fairness of mutual agreements of groups, is still unrealised in a community that remains segregated due to inherent prejudice and imbalance of power towards 'the other' (Chen, 2005:12; Marshall & Oliva, 2010:11; Department of Education, 1995). The educators and learners' reality is one that still confronts them with a politics of incommensurable differences (Soudien, 2006). These differences are based on the realities of the dilemmas faced by different groups in society. These dilemmas are associated with social justice and race*;* economic and social class; gender; sexual orientation; religion, disability, and diversity (bell hooks, 2007; Dotger & Theoharis, 2008; Lingard & Christie, 2003; Mahlomaholo, 2009b; Stevenson, 2007). Marshall and Olivia (2010:7) include groups that form part of a "border culture, reflecting the notions of, amongst others, hetero-sexism, holistic visioning, bridge people, hybridity, and cultural capital" (which includes human and social capital). These aspects are not yet evident in the literature on social justice in South Africa. These dilemmas or categories of social justice or injustice are at the centre of social justice discourse and the researcher will allude to them as well as to the most recent developments in more detail in Chapters Two and Three of this study.

Retributive justice (just punishment) is viewed as the practice of the judiciary, including policing and correctional actions which are not, essentially or necessarily, aligned with the social justice principles of dignity, equality and fairness. The past years has witnessed court cases of *inter alia*, Morné Harmse, the Waterkloof Four and Dr.Louis Dey as reported by News24 (http://www.news24.com/SouthAfrica). These are but three examples of retributive justice that has ended up in the courts. The question that it poses is why schools are seemingly unable to provide management strategies that will enable transformative social justice in education instead of correctional reprisal? The increasing call for an education system based on 'zero-based tolerance' implies a kind of post-positivistic convergence of scholarly thought towards an epistemic fulcrum of a punitive justice system in education, a retributive justice or even a justice of punishments (Miller, 1999:3) ruled by the law, instead of creating a socially just environment for education. The voices of zero-based tolerance, with regard to indiscipline in schools, were heard at the 2009 international SAELA conference in Mpumalanga (Mestry, 2009:27). On the one hand this conference seemed to mirror the critical reality of injustice and ill-discipline in schools. On the other hand it also seemed to suggest that such injustice and ill-discipline could be ascribed to a capitulation of the primary role of education, namely to create an equal, just and fair environment for all stakeholders in schools. This researcher's interest in social justice came about through reading about the detrimental consequences of retributive justice and the movement towards restorative justice as a preferred method of just punishment.

Other notions of social justice that are not specific to commutative justice as fairness of mutual agreements of groups or justice as retribution, include concepts that focus on human civilisation

and human rights norms. These relate to Rawls's concept of contributive and distributive justice, including individualised responsibility and the contribution of the individual to the freedom and dignity of others. The distribution of good (advantages) and bad (disadvantages) in society, and more specifically the answer to the question of how advantages could be accessed and distributed equally by those who were and still are not able to cross physical nor conjectured spaces, is raised, *inter alia*, by Miller (1999:11) and López, Gonzalez and Ferro (2010:100, 101). This lack of contributive justice includes a lack of justness, freedom and dignity, which are to be found in social justice and democracy and human rights norms (Ghai, 2001:1) viewed as "disenfranchised citizenship" in education (Soudien, 2006).

The debates on social justice issues, disenfranchised citizenship, nationality *versus* globalisation, human rights *versus* the notion of the good citizen are at the core of political and emotional discussions in the media and elsewhere. In a country such as South Africa, which is not merely a developing country, but also one with enormous disparities between those who are advantaged and disadvantaged, it would seem that educators, and others in educational structures such as higher educational institutions, may struggle to provide direction to their learners to negotiate and cross these boundaries between the advantaged and disadvantaged. López *et al.* (2010:101) argue that this space is filled with victims caught between the first and third world, "where the Third World grates against the First and bleeds." These - almost inaccessible borders - form the divide for all those who are not able to access the redistribution of justice or to negotiate it fairly. Educators seem to be powerless to provide direction to their learners to successfully negotiate and cross these borders. This ostensible powerlessness may be attributed to the fact that many educators themselves are still caught in the dissolute world behind the borders of inaccessibility and are still experiencing negative and inequitable treatment (Brown, 2004:79).

According to Karpinski and Lugg (2006), the notion of prospective justice is imminent due to the inability of the education sector to create a climate of hopefulness for a better academic and social outcome for all. This raises the question of why our schooling system is failing the most vulnerable and why we are not providing an environment of hope for these and all other learners. This notion of prospectiveness - of hope for the future - is not about the creation of a utopia as Miller (1999:x) asserts. Instead, prospective justice should be 'critical' and should bring about change towards a more fair and just society, maintained by educators and learners alike; prospective justice should be both realistic and achievable. The inclusion of hope as an aspect of social justice in education is an indication that there seems to exist a lacuna with regard to this vitally important educational principle. Teaching is, essentially, a praxis that at its very core is socially and morally constructed; teaching is essentially an act of hope - hope that the social contract between educators and learners will realise the promise of a democratic, fair and just school and social environment (Efron, 2008:51) through the employment of management strategies for social justice praxis.

For a socially just neo-education system, it is necessary to indicate that there is a lack of management strategies for social justice praxis in South Africa. The same is true, albeit to a lesser degree, in the Western world. Without a management strategy to implement a more just social educational system, theorising about social injustices and how to address them has little purpose. It is therefore important to establish a rationale for management strategies for social justice praxis. In this regard, Jonathan Jansen (2008:3) emphasises the need for great management and leadership dexterity. According to him, this will be of paramount importance in the management of the political change that occurs and that will keep on occurring in South African schools. The challenge for school principals as school managers and leaders is to find management strategies for social justice praxis that will provide access to those who are marginalised and who are predisposed to inequitable opportunities in our increasingly globalised, cross-cultural worlds (Dotger & Theoharis, 2008; Theoharis, 2007).

Gunter and Fitzgerald (2008:261) argue that the developing field of social justice research dovetails with the simultaneously emergent field of management praxis for effective social justice in schools. Social justice needs advocates in schools and in the field of education management. As such, advocates of and for social justice, should be school leaders who are able to lead and keep social justice at the core of their practice. These leaders for social justice should also be reformists, that is, transformational, with regard to divisive issues such as race, class, gender, disability, sexual orientation and other historically and currently marginalising conditions, so that they may best be in a position to instil hope in their learners (Theoharis, 2007:222). Education leaders should be infused with the will to foster successful, equitable and socially responsible learning and accountability practices for all students - a scholarship of practice - for social justice in educational leadership and management (Brown, 2004:80).

Since 2001 a new focus on the fundamental nature and core of education management strategies has emerged. Marshall and Oliva (2010:4) refer to it as "revolutionary" strategies: strategies "for rethinking and taking leadership for school practices to better meet diverse students' needs," strategies that will translate intellectual concepts into practice and "experiential understandings," and strategies for managing social justice relevant to education (Soudien, 2006). This changing landscape of education management is reverting from accountability, structures and systems back to the people who inhabit the education landscape, creating a socially just space, a locale that seems to be pivotal to schooling in the 21$^{st}$ century (Bush, 2007:391-404; Dotger & Theoharis, 2008; Gunter & Fitzgerald, 2008:263; Heystek, 2007:491; Lingard & Christie, 2003:320; Ryan, 2006:3; Stevenson, 2007:774; Zipin & Brennan, 2003:352). This entails that a transformative leadership "must practice co-intentional" management strategies (Freire, 2007b:69).

The recent trend to promote the so-called 'professionalization' of principals such as, for example, the Department of Education's ACE Programme in School Leadership (2007a),

brought questions into the open in terms of the viability of, on the one hand, educational leaders who are held accountable and, on the other, the possibilities that the development of management strategies for effective social justice praxis may hold. A movement towards leadership for social justice will impact on the practical, legal, educational and political levels of society (Van der Walt, 2005:3). The measure of this impact will, to a large degree, be determined by how educational leaders view themselves: as publicly accountable economic entities or as institutions that foster and maintain, through management strategies, innovative teaching and learning environments (Gayle *et al.*, 2003). A detailed discussion of the professionalization process in South African education and elsewhere can be found in Van der Westhuizen and Van Vuuren's article (2007:431-433) on professionalising educational leaders. At this point, it suffices to say that the current emphasis on professionalization will have to account for social justice leadership as one of the foci of management strategies for social justice in schools.

This professionalization endeavour also has to account, however, for "personal qualities necessary for effective management" (South Africa, 2007b:8) that will include, *inter alia*, role modelling in the school and the community, strategic thinking and planning, motivation and the ability to empower others to participate in school activities, including the skills related to co-operative leadership rooted in the African tradition of *Ubuntu* ("*Umuntu ngumuntu ngabantu*" - a person is a person through other persons). These qualities and abilities, which require educational leaders steeped in social justice practice, could be grouped together under the concept of transformative, ethical leadership (Collard, 2007; Rucinski & Bauch, 2006:487; Siegel, 2011; Starratt, 2009:74). The question arises, however, whether educational leaders in a country such as South Africa possess these qualities as enablers of schools for social justice? Educational leaders who are working in diverse cultural landscapes need sophisticated understandings of the concept of cultural diversity and specifically its management (Collard, 2007; Van Vuuren, 2008). They should be well-informed and transformative as public intellectuals who are constantly questioning, critiquing, reflecting and interrogating issues of race, class, and gender, embracing diversity and effortlessly rejecting elitism and exclusivity, being examples of moral and ethical leadership (Collard, 2007; Dantley & Tillman, 2010:24-26). The reality in the South African education system is that the political promise of "education for all" did not produce the fruits it envisaged in 1994, but perpetuated marginalisation, exclusion, powerlessness, cultural imperialism and violence (Hugo, 2005:23; Pendlebury & Enslin, 2004:36; Soudien, 2006:1).

The literature reviewed focused on the non-realisation of social justice as **commutative justice, retributive justice, contributive justice, distributive justice and prospective justice.** The literature also shows that social justice issues are not adequately addressed in leadership or management education, nor is theory, research and praxis based on a holistic approach (Ryan & Rottmann, 2007). It is necessary, therefore, to provide pragmatic strategies that will assist in

developing social justice, and more specifically, management strategies enabling and sustaining effective social justice praxis through transformative leadership practice. Educational leaders should be able to move into a culturally diverse landscape addressing the challenges that a diversity of learner and parent populations will bring.

In conclusion, it is this lack of management strategies to advance effective social justice practice in schools that this research wants to address, providing results in the South African context, as argued above. This research should, therefore, not merely be viewed as crucial, timeous and relevant, but as a *sine qua non* for management strategies for social justice in a developing South Africa and within a broader African context as well. This research seeks to add to the available body of scholarship and could enable an educational culture in which the proclaimed constitutional, democratic, humane values of human dignity, equality and freedom*,* s.7 (South Africa, 1996a) can be realised and effected in a neo-educational system for social justice.

## 1.4    PURPOSE OF THE RESEARCH

From the discussion above it is evident that there exists a need for the development of management strategies for effective social justice practice in schools.

The following aims will be used to investigate the research problem:

**Research aim 1**: to determine theoretically, the *nature* of social justice (Chapter Two).

**Research aim 2**: to identify and analyse theoretically, the *determinants* that contribute to social justice practices (Chapter Three).

**Research aim 3***:* to *qualitatively* analyse *effective* social justice praxis in selected schools (Chapter Four and Five).

**Research aim 4***:* to develop *management strategies* for effective social justice practice in schools (Chapter Six).

In attempting to realise these aims, the following research approach, design and concomitant methodology will guide this research.

## 1.5    RESEARCH APPROACH, DESIGN AND METHODOLOGY

### 1.5.1    Research paradigm

This theoretical study was guided by a crossover methodology that utilised both social-transformative emancipatory and the social-constructivist paradigms. Although there is a myriad of research paradigms, philosophical positions, theoretical frameworks or models, and even a range of grand, middle and substantive theories (Camp, 2001:31; Van der Westhuizen, 2011),

this research was guided by the two paradigms mentioned. This is, in its simplest form, a value-based research for one purpose only, namely research towards the creation of social justice, fairness and equity in educational praxis. Assumptions underpinning the social-constructivist grounded theory paradigm provided an overarching framework and opportunities to address issues of social injustice, advocacy and empowerment, and subsequent decisions with regard to the chosen methodologies (§4.2) (Mertens, 2007:212, 215). The paradigm provided the opportunity to understand the nature of the reality of social justice praxis, the ontology in schools with regard to management strategies for effective social justice praxis. This reality is and was shaped by historical, social, political, economic and other related forces. The paradigm supported the findings in relation to the importance of constitutional values.

The social-transformative paradigm is concerned with justice and more specifically social justice. In considering the challenge of building a socially just school community through management strategies, the adverse effects of South Africa's past and continuous political and social injustices were viewed with a critical and transformative lens, regarded as a distinct form of research, and used to determine constitutional values and empowerment approaches (Creswell, 2009:66). This paradigm allowed the researcher to use other paradigms, such as the social-constructivist paradigm that further focuses on actions towards solutions (Creswell, 2009:67) of and for social justice problems in education and the educational system.

In deliberately choosing a crossover methodology, the combined strengths of both the social-transformative emancipatory and the social-constructivist paradigms informed this research to accomplish ethical conduct with regard to social injustices. This reality was and is characterised by a diverse school population and the resultant tensions of individualised and systemic discrimination and oppression, justice and injustice in school communities (Mertens, 2009:2). Mertens delineates the transformative emancipatory paradigm to research that is primarily concerned with a framework of belief-systems and provides a metaphysical umbrella. Creswell (2009:67) credits Mertens as being the advocate for the transformative emancipatory paradigm that brought emancipatory, anti-discriminatory, participative, Freirian, feminist, racial/ethnic, individuals with disabilities, and marginalised groups under one umbrella. Mertens (2009:2) further extends the transformative-emancipatory paradigm to include research that comprises critical and feminist theories, human rights based, indigenous/postcolonial and culturally responsive theories. Mertens (2009:2) also brought tensions as catalysts to the fore in naming, *inter alia,* resilience in communities, discrimination/oppression, blame-the-victim, unearned privilege, romanticising the indigenous as opposed to villainising the so-called colonisers, inclusion/exclusion and cultural complexities that include gender, sexuality, language and age. The transformative paradigm was a framework of belief systems that was about engagement of culturally diverse groups with the focus on increased social justice praxis.

The social-constructivist paradigm lens brought about an understanding of the nature of social justice. It provided an epistemology to the processes of interpretation, interactions and findings that were constructed by means of a qualitative, constructivist,- grounded theory approach to research about the phenomena social justice (§4.2.3). This paradigm scaffolds a theory based on understanding, acknowledged the existence of multiple participant meanings that were socially and historically constructed and supported in building new theories on social justice praxis. This entailed developing a theory that throughout the research formed a pattern of meaning (Creswell, 2009:8). Merriam (2009:8) supports this notion when she postulates that a philosophical positioning of qualitative research is necessary to explain what one believes about the nature of reality or ontology and of knowledge and epistemology.

This study therefore is aligned with Mouton's (2009) assertion that philosophers have only interpreted the world and humankind in various ways; the point is to change it. This viewpoint leads to meta-theoretical debates on the nature of science, and more specifically the nature of social science. The single most distinctive feature of the critical meta-theory is its insistence on science becoming an emancipatory and transformative force in society. Mouton (2009) states that the methodological framework that determines the meaning of the validity of critical propositions of this category is established by the concept of self-reflection. The latter releases the researcher from being dependent on "hypostatised" powers, whilst self-reflection guided an emancipatory cognitive interest. It is in finding the facts, determining the value and prospective policy, defining the concept of social justice and interpreting socially constructed findings that the legitimacy of Bourdieu's (1990:122) claim that theory is in practice and practice is in theory, becomes evident.

In arguing research in and on social justice in education and for education, this research supported the notion that although all education research should be about social justice, not all research has the same degree or impact on social justice praxis. However, all educational research should have the social justice betterment of the individual, the school, the community and the system as its focus (Griffiths *et al.*, 2003c:7). To suppose that a theory - in this instance on social justice - is literally true would imply, among other things, that no further inconsistencies could, in principle, arise from any quarter with regard to the studied phenomenon and that therefore no further research was necessary. This would render research impotent. In accepting the constructivist nature of scientific facts - facts are not given but are 'constructed,' even 'fabricated' - through a complex interplay of cognitive and social processes where intellectual resources, relations of power and material constraints that co-produce data are to be found (Mouton, 2009:52), this research ventured into the field of reflective theory construction on effective social justice management praxis in education.

This ontological view of what constituted social justice and how management strategies could enhance social justice in schools was situated within specific historical, social and economic

realities of space/time and contexts (Mahlomaholo, 2009a:2; Mertens, 2007:216). It allowed the researcher to understand, at an epistemological level, how she came to know the research phenomenon. The realities of social justice were socially constructed and needed to be deconstructed to shed light on what was deemed to be socially just and how management strategies for effective social justice might reveal itself in schools (Van der Westhuizen *et al.*, 2009).

## 1.5.2   The literature study

The literature study was the first phase of this research project. Both primary and secondary sources were used to gather more information on the development of management strategies for effective social justice practice in schools. Electronic databases were used and accessed via the Internet and formed an important part of the literature review such as the following examples found through Google search:

http://nces.ed.gov

www.Questia.com

http://sh2mg2av5k.search.serialssolutions.com/

http://www.idp.com/research/database_of_research/quick_search.aspx

http://www.scholarlyexchange.org/

http://rer.sagepub.com/

http://www.editlib.org/search/

http://www.informaworld.com

http://ahero.uwc.ac.za/

Other databases, such as NEXUS, GKPV, RSAT, including education management and management indices, were used for the purpose of an in-depth literature study. Databases such as EBSCOHost (ERIC & Academic Search Premier), the Internet, Public Library (www.ipl.org), JSTOR, ScienceDirect and AlltheWeb were explored and analysed for relevant data that formed the foundation of the theoretical premise for this research. The NWU Library (http://www.nwu.ac.za/af/library/index_a.html#) provided invaluable support.

The following **key words** were used for the literature search: social justice, human rights, commutative justice, retributive justice, contributive justice, distributive justice, prospective justice, education, leadership, management strategies, ethical and moral leadership, values, democracy, transformation, professionalization, policy imperatives, educational research.

## 1.5.3   A qualitative research methodology

A research methodology is viewed as the functional plan in which certain research methods and procedures are linked together to acquire a reliable and valid body of data for empirically grounded analyses, conclusions, and theory formulation. As such, the research paradigm, the nature of the research problem and related research aims called for a purposeful design to meet

the requirements of the research intentions. For this reason a qualitative constructivist-grounded design was chosen to conduct this research (Creswell, 2007:37; Merriam, 2009:169). A qualitative constructivist-grounded theory research design is viewed as a set of interrelated constructs, definitions, and propositions that present a rational view of a phenomenon by explaining or predicting relationships among those elements expressed in either mathematical/analogue terms and/or as conceptual/holistic terms of the same relationship. Potgieter (2009b:3) refers to the element of a compromise, of finding the middle ground, when combining two independent research methodologies. These philosophical assumptions of the research approach and methodologies resulted in the qualitative constructivist-grounded theory paradigm that provided the philosophical and paradigmatic grounding for the research design and resultant hermeneutic-phenomenological methodology*.*

### 1.5.3.1    Data capturing

Data were captured through individual and semi-structured focus group interviews. This allowed for in-depth information about the target group's perceptions, knowledge, experiences, opinions and beliefs (Anderson, 2004:109; Best & Kahn, 2003:255, 257). These interviews covered different forms of inquiry to provide an understanding and explanation of the meaning of social justice as phenomena without interference in the natural environment (Merriam, 1998:5). The voices of those who were practicing effective social justice in schools enriched the dialogue and deepened the understanding of the factual and experiential foundations of this research (Prinsloo, 2009:23). The qualitative research data were captured through interviews, listening, recording of data, and the recording of experiences.

### 1.5.3.2    Trustworthiness of interview document

Trustworthiness was an essential component of this qualitative study. According to Creswell (2009:190), the determining factors of trustworthiness, also referred to as "**qualitative validity**", was determined by a process through which the accuracy of the findings was determined. Notwithstanding some scholarly discomfort with this term leaning more towards quantitative research, the researcher mostly followed Guba and Lincoln's notion of qualitative validity (2005:205-209). At the same time qualitative reliability was ensured through consistency. In order to establish reliability or trustworthiness (Guba & Lincoln, 2005:205-209), the researcher

- did the transcripts of the interviews herself (reliability),
- scrutinised the transcripts to ensure that no obvious mistakes were made during transcription (reliability),
- utilised Atlas.ti™,
- consistently applied coding, compared data with the codes and made mental memos about the codes (reliability),
- triangulated the different data sources (trustworthiness),

- engaged in participant checking (trustworthiness),

- used rich, abundant descriptive findings (qualitative validity),

- declared the researchers' own bias (trustworthiness),

- presented negative/discrepant information that was contradictory to the themes (trustworthiness),

- spent ample time in the field to enhance her own understanding (trustworthiness),

- and asked for peer debriefing from the advice committee to act as external auditor to review the entire research process (trustworthiness).

### 1.5.3.3 Study population

The study population for the qualitative measurement consisted of two groups, determined in accordance with a predetermined set of criteria (§4.3.2.3):

- Individual interviews: twelve principals and two deputy[1]-principals of secondary and combined schools employed by the Department of Education in two districts in the North-West Province in South Africa (§4.3.2.2)

- Focus group interviews: the study population, who served as a pool for the convenience and self-selected sampling, were two district officials, seven principals and two deputy-principals from primary, secondary and special education need schools employed by the Cape Winelands Education District in the Western Cape Department of Education (§4.3.2.2).

In this case the number of participants in each stratum did not reflect proportionally the population but provided room for all population groups to be represented on a fair and equal basis.

### 1.5.3.4 Qualitative data analysis

The coding of the data was done through a computer software programme, Atlas.ti™. Axial coding was used to determine emergent ideas and/or themes which were organised into categories and sub-categories to ensure the capturing of data on the conditions that gave rise to social justice, understanding the context, and the strategies that people used to manage or carry out social justice and the consequences of those strategies (Leedy & Ormrod, 2005:141). In so doing, the researcher immersed herself in the data and reflected on causes and consequences, conditions and interactions, strategies and processes suggested in the data.

Selective coding further enhanced understanding through the scanning of classified data with a view to identifying similarities and/or differences in and among the identified categories in order to develop a story line that described what happened in effective social justice and the concurrent management strategies praxis (Leedy & Ormrod, 2005:141).

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[1] Deputy in this thesis refers to Deputy-Principal.

Open coding was used to identify themes, commonalities of themes or categories, after which the data was examined for properties, attributes and/or subcategories, that characterised each category, and the initial labelling of data was done to reduce the data to a small set of seven themes that described social justice practice in schools (Leedy & Ormrod, 2005:141).

## 1.5.4   Researcher's role

One had to contend, however, with the contextual reality of the researcher's limitations in terms of being part of a specific space and time or, as Miller (1999:62-63) posits, circumstantial and pluralistic realities. It was this social justice researcher's task to understand the basic structure(s) of the society being explored. As such, she acknowledged that it was a perspective from within, from being part of that specific society. Moreover, the social justice researcher should be able to recognise inequalities and injustices in society and be able to challenge the status quo (Mertens, 2007:212). The researcher's role was visible in all the research activities, as researcher and as facilitator of the activities during and after the interviews. The researcher was the primary instrument of data collection and developing theory (Merriam, 1998:17; 20).

The researcher was responsible for

- designing all the instruments,

- obtaining permission and adhering to ethical research principles,

- conducting the interviews and facilitating the focus group interviews,

- and analysing all the recorded data.

The researcher consulted with colleagues from the Faculty of Educational Sciences to interpret the qualitative data collected during interviews and focus group discussions. The initial findings were also discussed with her supervisors before being documented and finally submitted for evaluation.

## 1.6   CHAPTER DIVISION

Chapter 1:      Orientation: research problem and question.

Chapter 2:      Conceptual framework: The nature of social justice.

Chapter 3:      Theoretical framework: The determinants of social justice practices.

Chapter 4:      Research approach, design and methods.

Chapter 5:      Data analysis and discussion.

Chapter 6:      Management strategies for effective social justice leadership praxis in schools.

Chapter 7:      Reporting the findings and recommendations.

## 1.7   ETHICAL ASPECTS

This research was performed with full recognition of the relevant aspects of research as it is embodied in individual and professional codes of conduct of the empirical mode of research. The following ethical aspects were accounted for (Leedy & Ormrod, 2005:101-104; Merriam, 1998:216-218; Mouton, 2001:238-248): protection from harm, informed consent, right to privacy, honesty with professional colleagues, internal review boards, and adherence to professional codes of ethics as required by the NWU's Code of Ethics. The rights and expectations of participants were respected and anonymity and confidentiality was guaranteed. The purpose of the research was communicated in a clear and honest manner. As far as possible, no intrusion in the professional lives of the participants was allowed.

## 1.8   CONTRIBUTION OF RESEARCH

The contribution of this research was situated in the development of management strategies for effective social justice leadership in schools, contributing to the knowledge base, and enhancing the development of this field of knowledge creation, both nationally and internationally. It would not only enhance education management and leadership research but, it is hoped, it would enhance our command of the relevant knowledge in such a manner that it will assist in leading us towards a culture in which the proclaimed constitutional, democratic values of human dignity, equality and freedom s.7[2] (South Africa, 1996a) will be realised through management strategies for effective social justice.

## 1.9   CONCLUSION

This chapter served as an orientation to the research and gave a descriptive understanding of the structure of the thesis that reported the findings. It provided a layout of the research aims and methodology, the research design, while it presented an explanation of the layout of the thesis and its chapters. The preliminary scholarly review of this chapter that informed the researcher's problem statement highlighted the theoretical and conceptual complexities of social justice and the lack of management strategies for effective social justice praxis. The focus of and problem statement to this research were trained on the intellectual question of how management strategies may assist in building a community of effective social justice praxis in education. The following chapters will extensively cover the research problem, the onticity (Chapter Two) and determinants (Chapter Three) of social justice, and the research approach, design and methods (Chapter Four), and data analysis and discussion (Chapter Five). All of

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[2] Throughout this document references to s. should be read as a reference to a specific section of an Act, i.e. s.7 of the Constitution, is read as section 7 of the Constitution.

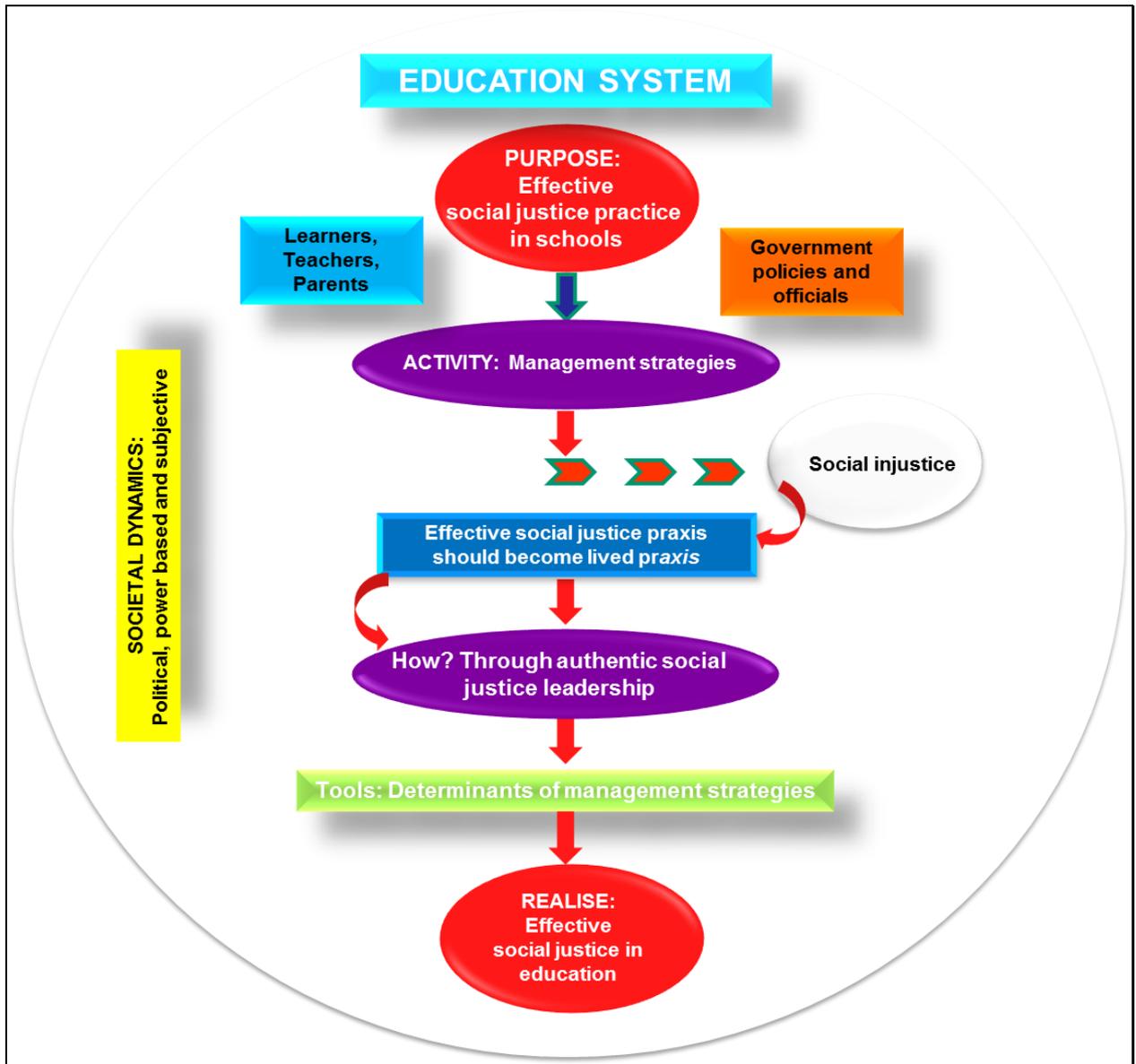these culminated in the findings (Chapter Six) and recommendations (Chapter Seven) to this research.



**FIGURE 1.1:** Conceptual think-piece at the onset of the research process

The next chapter determines, theoretically, the nature of social justice.