UNIVERSITY OF KWAZULU-NATAL

NEGOTIATING BETWEEN TWO COMPETING LEADERSHIP ROLES: NARRATIVES OF PRINCIPALS SERVING AS TRADE UNION EXECUTIVE MEMBERS

BY

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DECLARATION

I, Ndumiso Hlongwa declare:

I. The research reported in this dissertation, except where otherwise indicated is my original work.

II. The dissertation has not been submitted for any degree or examination at any other university.

III. This dissertation does not contain other persons' data, pictures, graphs or other information, unless specifically acknowledged as being sourced from other persons.

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Reseacher: Ndumiso Hlongwa   Date: 01 March 2021

SUPERVISOR'S STATEMENT

This dissertation is submitted with my approval.

Signature: _____   Date: 02 March 2021

ACKNOWLEDGEMENTS

DEDICATION

I dedicate this study to my mother, Nomathemba and my late father, Kimbo Hlongwa (May his soul rest in peace).

ABSTRACT

This exploration study focused on school principals who are also serving as trade union executive members. The study was conducted with three school principals, namely, two from primary schools and one from a full-service school. The purpose of the study was to explore these school principals' background as well as their lived experiences. Further, the study examined the role identities they construct of themselves, the influence of serving in a union executive committee on school principals' leadership practices and their negotiation between the two contesting leadership roles. Three research puzzles were utilized as tools to generate data, namely, what role identities do principals construct of themselves as school principals and also as trade union leaders, how does serving in a union executive committee influence leadership practices of principals and how do school principals serving as trade union leaders negotiate between the two contesting leadership roles? The theoretical framework used to understand the lived experiences of the participants consist of two theories, namely, social identity theory and relationship leadership theory. Narrative inquiry methodology was used to conduct this study. Data was generated by making use of unstructured interviews, collage inquiry and artefacts inquiry. Generated data was then analysed at two levels, namely, narrative analysis (first level of analysis) and analysis of narratives (second level of analysis). In the process of establishing the role identities that the participating principals construct of themselves, two themes emerged; namely, school principals first before becoming union leaders and trade union leaders as political activists. In addition, it was found that union inherited traits and fellow union members' scrutiny influence the participants' leadership practices in schools. Again, the study put to light two critical aspects that are utilised by the participating principals to negotiate between their two leadership roles; namely, time management and strong collaboration within their SMTs. Finally, the study revealed that teacher unions equip principals with skills and qualities needed to lead schools. It was then concluded that teacher unions are another avenue from which principals who are also union executive leaders draw quality leadership skills.

LIST OF ABBREVIATIONS

ACE	Advance Certificate in Education
ACE: SLM	Advance Certificate in Education: School Leadership and Management
ADE: SLM	Advance Diploma in Education: School Leadership and Management
AFT	American Federation of Teachers
ANC	African National Congress
ANCYL	African National Congress Youth League
BEC	Branch Executive Committee
COLT	Culture of Learning and Teaching
CPD	Continuous Professional Development
COSATU	Congress of South African Trade Unions
DBE	Department of Basic Education
HOD	Head of Department
IFP	Inkatha Freedom Party
INSET	In-service Education and Training
IQMS	Integrated Quality Management System
KZN	KwaZulu-Natal
KZN-SRCs	KwaZulu-Natal- Student Representative Councils
MLA	Monitoring of Learning Achievement
NAPTOSA	National Professional Teachers Organisation of South Africa
NATU	National Teachers' Union
NDP	National Development Plan
PEC	Provincial Executive Committee

PEU	Professional Educators Union
PMDS	Performance Management Development System
PPN	Post Provisioning Norm
REC	Regional Executive Committee
R&R	Redeployment and Rationalisation
RSA	Republic of South Africa
SACE	South African Council of Educators
SACP	South African Communist Party
SACMEQ	Southern Africa Consortium for Monitoring Educational Quality
SANPQP	South African National Professional Qualification for Principals
SADTU	South African Democratic Teachers Union
SAOU	Suid Afrikaans Onderwys Unie
SAYCL	South African Young Communist League
SAYCO	South African Youth Congress
SGB	School Governing Body
SMT	School Management Team
SRC	Student Representative Council
STD	Secondary Teachers Diploma
TIMSS	Trends in International Mathematics and Science Study
UDF	United Democratic Front
UDW	University of Durban-Westville
UNISA	University of South Africa
UKZN	University of KwaZulu-Natal

UK	United Kingdom
UTE	Unprotected Temporary Educator
USA	United States of America
VSP	Voluntary Severance Package

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CHAPTER ONE

INTRODUCTION AND ORIENTATION TO THE STUDY

1.1 Introduction

This qualitative study focuses on the lived experiences of principals who hold two competing leadership roles, namely, a school principal and a trade union leader. The study aimed to explore how these leaders negotiate between these roles, noting that these roles call for accountability to dissimilar bodies. This chapter outlines the background and the statement of the problem as well as the rationale for the study. Additionally, the key questions are presented, the key terms of the study are clarified and the location of the study is presented. In closing this chapter, I present the outline of chapters and the summary of this chapter.

1.2 Background

Trade unions' responsibility, among others, is to challenge power of the employer in defence of the employees who are union members (Zulu, Urrbani, Van der Merve, & Van der Walt, 2004). In South Africa the first black teacher trade union called Native Educational Association was established in 1879. This teacher trade union was established to address political challenges brought in as a result of Pass Laws as well as the discrimination around the issues of salaries between white teachers and black teachers (Heystek & Lethoko, 2001). Post-colonial years, teacher trade unions were established to fight against one party state system, neo-liberalism, injustice, corruption, fraud and all forms of unfair labour practices including apartheid policies. This is why South African trade unions are perceived as the custodians of democracy. Friedman (1987) argued that trade unions are pioneers of workshops that produce knowledge, promote social interaction and unity of purpose among members. Therefore, teacher unions of today have a duty to play in restoring professionalism and bringing back the culture of learning and teaching (Hystek & Lethoko, 2001). This is the main reason why teacher unions are contributing immensely to the capacity development of their members (Dlamini, Smit, & Loock, 2014).

The existence of Bantu Education Act of 1953, post-colonial age led to the formation of various teacher unions. This was, in the main, as a result of the fact that Bantu Education Act of 1953 emphasised that the education of black people should remain inferior such that Black

Africans could not imitate English and other European cultures. Further, it advocated that education for Black Africans should remain at the level where it only inculcates the character of the black people (Finnemore, 2013). Therefore, the teacher unions rose to fight against this notion. This was an actual war directed to apartheid regime.

South African Democratic Teachers' Union (SADTU), National Professional Teacher Organisation of South Africa (NAPTOSA) and other small teacher unions are a product of the war against apartheid (Mafisa, 2017). These unions do not exist to fight for the rights of their members and poor working conditions only but also to contribute to the development and transformation of the education system in general and the teachers in particular (Ball, 2011). This is in line with the view that SADTU and NAPTOSA pride themselves as the pioneers in the development of teachers including principals in South Africa (Mafisa, 2017).

The advent of democracy after 1994, brought a new era with its own challenges in respect to the implementation of the new policies including the National Development Plan (Finnemore, 2013). Professor Jonathan Jansen, the former vice-chancellor of Free State University and an education expert raised complaints about the political dominance and influence of teacher unions in the education system of South Africa. He raised this in one of the interviews he held with the S. A. FM in 2010. Further, it is in the public domain that the education system of South Africa is captured by unions, particularly, the biggest ones. This is revealed in the study conducted by Mthiyane, Bhengu and Bayeni (2014) regarding the performance of schools in KwaZulu-Natal. These scholars point out that the collapse of education and schooling system in South African townships and rural areas is caused by teacher unions, specifically, SADTU (Mthiyane, Bhengu & Bayeni, 2014).

SADTU is militant and radical in her approach to dealing with disputes against the employer, the Department of Basic Education (DBE). This is in contrast with the manner in which other teacher unions like NAPTOSA deal with the employer. Finnermore (2013) describes SADTU's approach as emanating from its radical political history. SADTU is a product of the political struggles against apartheid hence its arrogance, militancy, violence and radicalism (Amoako, 2014). She is an affiliate of the Congress of South African Trade Unions (COSATU) which is in alliance with the South African governing party, the African National Congress (ANC). Therefore, strikes, boycotts and stay-aways are built in her system. That is the reason why she remains a radical teacher union even during the democratic dispensation (Chilshom, 1999).

School principals who are executive members of trade unions may be perceived as a threat to the education of learners in South Africa because they are also seen leading strikes and boycotts. In the eyes of the public this may be construed as contravention of the Bill of Rights as enshrined in chapter one of the constitution of South Africa wherein clause 29 (a) states that "everyone has a right to basic education including basic adult education," notwithstanding the fact that the same constitution of the country permits principals as workers to organise and associate themselves with any organisation of their choice (Constitution of RSA Act 108 of 1996).

In this study the principals' role and the trade union executive role are perceived to be contesting. On the one hand, the principal is an educator and the code of conduct for educators as enshrined in the South African Council of Educators Act 31 of 2000 directs educators to conduct themselves in a professional manner, to dedicate themselves to their duties and also to prioritise interests and rights of the learners. On the other hand, trade union leaders are expected to make use of a military spirit to fight for teachers' wellbeing. Seeing that the principals are not only educators, but they also represent the Head of Department (employer), I find it puzzling to understand how they on the one hand represent the employer and on the other hand strive for teachers' wellbeing. As a result, I focus on school principals who are holding these two contesting roles in this inquiry with an intention to understand how these leaders negotiate and strike a balance between these two roles.

1.3 Problem statement

School principals are supposed to be the first line of the employer hence they are given a responsibility to represent the Head of Department in schools. Their duties include among others to see to it that the policies, decisions and other legislative mandates of the Department of Education are implemented in their schools as expected. They must provide strategic direction to the entire school community on behalf of the Head of Department, to this end; their allegiance should remain with the department of education. I have observed particularly in KwaZulu-Natal that executive leadership positions in teacher unions are mostly held by school principals. This is despite the fact that trade unions' fundamental duty is to defend and protect their members' interests against the employer's at all cost. We have seen teacher unions exerting disruptive activities in South African schools in defence of their members' interests (Msila, 2014; Mthiyane, Bhengu & Bayeni, 2014). The problem, therefore, is how

do school principals holding a trade union executive role negotiate between these two competing leadership roles?

1.4 Rationale for the study

When I completed my matric in 1998 I knew that I wanted to become a teacher. I was inspired by the manner in which my high school teachers dressed and behaved. I learned from them that teaching is a noble profession. I perceived teaching as a profession with job security, free from violence and strikes. I respected our teachers more than I respected my parents.

My parents did not have enough money though, to take me to a college of education to train for teaching, thus I ended up having to look for a job after completing matric in 1989. I fortunately got the job in a local textile company. This led me to a position of becoming a breadwinner hence I had to take care of my two younger siblings who were still doing lower grades. Under the circumstances, I was able to save the little I was earning in order to implement my vision of becoming a teacher one day.

Although I was working for a textile industry, my interest had always been in the teaching fraternity such that I used to follow the activities that were reported in the news about the teaching fraternity. In 1992 I got surprised to learn from the media that teachers were highly unionised such that they could go on strikes. This information came to my attention as Cape Town teachers were threatening the department to embarking on strike action. Cape Town teachers were fighting against the department's implementation of restructuring of the education system and retrenchment of teachers. Their complaint was mainly around the notion of proper consultation with the teacher unions. The media, further, reported that these teachers were going to march to the Cape Town city hall to register their dissatisfaction. This resulted in the Department of Education abandoning its plans of retrenchments and restructuring in fear of the disruptions of the end of year examination. Unfortunately, the same media reported at the beginning of 1993 that the Department of Education revisited its plans to reduce the number of teachers in the system through the process called rationalisation or right sizing of schools. This move coincided with the clarion call made by Dr Nelson Mandela (the first black South African President) in the funeral of Chris Hani, the then Secretary General of the South African Communist Party (SACP) that young South African people should go back to school. This call encouraged me to apply for admission at

the training college of education. The timing here was good because both my siblings had completed their matriculation examination, however, it was scary owing to the fact that the Department of Education was already in loggerheads with the teacher unions around the issue of retrenchments and restructuring.

I accepted the challenge of going back to school following the clarion call made by Dr Nelson Mandela, however, my only concern was around the notion that the Department of Education was on the verge of terminating all the contracts of temporary educators, let alone the fact that at that stage it came as a surprise to me that some teachers in the system were employed on a temporary basis. I got little hope when I heard that teacher unions were up in arms with the Department of Education in an attempt to stop the termination of contracts of temporary teachers. It became a public discourse that teacher unions described the Department of Education's move as a declaration of war. Many other distasteful messages landed in my ears regarding the teaching fraternity, e.g. that the DOE was in financial difficulties hence it placed a moratorium on teachers' study leave.

Upon hearing all the above, I began to feel anxiety, nervousness and a sense of uncertainty regarding the love I had for the teaching profession. Nonetheless, I did not abandon the idea of going to a training college because this was my long-standing vision. I started at the training college in January 1994. That is the year I understood the role of teacher unions in the education system including their strong influence in the affairs of the Education Department. I also witnessed that most teachers were trade union activists. This was contrary to the understanding I held when I was at the high school level. My understanding at high school was that teaching was a noble profession and an essential service thus the education of the learners should always be given the first priority.

I completed my teacher training in 1996 and joined the teaching profession in 1997. This was the year in which redeployment and rationalisation process was implemented. The process of redeployment and rationalisation involved moving surplus teachers from their original schools to the schools with shortages of teachers. It entailed the right sizing of schools. I had heard about this process and the influential role of teacher unions in the meetings meant to discuss the implementation of redeployment and rationalisation (R&R) when I was still studying in 1996. I am assuming that it is the same R&R process that delayed my appointment as a teacher after completing my studies hence I was appointed on the 8 May 1997. My presumption is that my appointment was as a result of the DOE's passing of the

policy of Voluntary Severance Packages (VSP). The VSP policy was passed to create an exit plan for the older teachers who did not want to be negatively affected by the R&R process. Therefore, it is my view that the older and experienced teachers gave space for us young novice teachers. I was very pleased to be employed as a teacher even though I was employed as an Unprotected Temporary Educator (UTE).

The influence and dominance of teacher unions was described by many as the causal factor for the constant fights between the school principals and the union representatives in schools. Having known power, influence and dominance of teacher unions in the education system, I decided to join South African Democratic Teachers Union (SADTU) that was described as the most powerful and the biggest union in the education sector. As a SADTU member, I noticed that a school based executive committee chairperson of the union (known as site-steward) is very sharp and knowledgeable on labour matters. The site-steward in my school often displayed knowledge and sharpness more than the school principal thus posing a threat to the whole school management team.

In 1998, twelve months after becoming a paid-up member of SADTU I got elected to the position of a site-steward. That is when I started to attend the developmental meetings and workshops organised by the union. It became clearer to me that teacher unions develop their leaders on all critical policy areas and on leadership and management programmes. Very few principals were active members of the teacher unions during my time as a site-steward. Therefore most of the union executive positions were held by ordinary teachers (post level one) at all levels of teacher union leadership. In my school, as a site-steward, I became very instrumental such that the principal would start by consulting with me first before any critical matter was taken for discussion in the staff meeting. The whole school felt my presence in such a way that the school management would want to hear my view point first before any critical decision was taken.

In 2008, eleven years later, I got promoted to the position of a school principal. When I became a school principal, most of the principals were already active members of teacher unions and some were even serving as executive members at a branch, regional, provincial and national levels. The involvement of school principals in the executive committees of teacher unions was perceived by some interested parties as a calculated move to dilute and cut the biting teeth of teacher unions. The persistent power and radical character of teacher unions proved to negate this notion. Therefore, this makes me wonder how the employer

representatives (school principals) in schools successfully become employee representatives in teacher unions. I wonder how do they earn respect and trust from teacher union membership. It puzzles me as to how do they use the radical and militant approach as expected by union membership when dealing with the department of education (the employer). I observe with keenness as to how do these principals manage to run schools effectively whilst they are on the other hand serving as trade union executive members.

The literature I have read thus far puts more focus on the negative impact caused by teacher unions in the education and schooling system as opposed to the positive role played by principals who are union executive members in enhancing the standard of education and schooling system in South Africa. Some scholars argue that the poor performance in schools is caused by teacher unions. This is revealed in the study on the performance of township and rural schools in KwaZulu-Natal. This study revealed that poor performance in schools is caused by teacher unions (Mthiyane, Bhengu & Bayeni, 2014). Furthermore, teacher unions are perceived by the media and the public as organisations that do not have the interests of the learners at heart instead they possess narrow self-interest (Amataika, 2013). Bloch (2009) describes teacher unions as disruptive and hostile towards positive educational reforms. This is contrary to the view held by teacher unions such as SADTU and NAPTOSA (the biggest teacher unions in South Africa). These teacher unions pride themselves about being the pioneers in providing developmental leadership and management programmes hence they advocate that schools that are headed by principals who are union executive members are effective, functional and high performing (Mafisa, 2017). This study therefore, will help to address the dearth in literature by bringing to light the perspectives of school principals regarding their dual role in the education system. Through this study I got rich information from the principals themselves on how do they negotiate between their two contesting leadership roles?

1.5 Key research questions

This study sought to answer the following critical questions:

- What role identities do principals construct of themselves as school principals and also as trade union executive leaders?

- How does serving in a union executive committee influence leadership practices of principals in schools?
- How do school principals serving as trade union executive members negotiate between two contesting leadership roles?

1.6 Clarification of key terms

1.6.1 Leadership

According to Bush (2007) most definitions of leadership contain a process of influence at the centre. Robinson, Lloyd and Rowe (2008) also maintain that most of the authors hold the view that leadership is the ability to influence others towards the realisation of predetermined goals. Such influence must be informed by shared values and purpose. Therefore, leadership in the context of the schooling system in my conclusion is more about influencing and providing inspiration to the whole school community including teachers with an aim of realising the intended educational goals that will turn the school to an effective organisation.

Furthermore, Davies (2009) argues that leadership is not about an individual rather is about a group of individuals who give direction and inspiration to the followers with an aim of achieving good outcomes for the benefit of the whole group. Hallinger (2003) describes leadership as built in the relationship, context as well as the complex or ambiguous conditions under which the group operates. Therefore, leadership in the teacher trade union context, in my view is about the relationship, support and inspiration the group enjoys in their operating conditions which lead to the achievement of what is best and beneficial to the whole group or membership.

1.6.2 Trade union

A trade union is defined by the Congress of South African Trade Union (COSATU) as "The union that takes place when workers meet and identify their problems, their demands and actions they are prepared to take to change conditions in which they work and live. The union is when ordinary members exercise their democratic worker control of collective bargaining processes (COSATU, 2013). Vall (2010) defines a trade union as an organisation consisting of workers who come together with an aim of achieving one common objective which is to

advance their collective interests. The collective interests of workers include collective bargaining around the conditions of service and matters pertaining to salaries and other work-related disputes. This forms the ground of collective action. Therefore, these definitions spell out explicitly that in the coming together of workers to develop programmes and mechanisms to better their working conditions to produce quality work; they are actually converging in an organisation called a trade union. This is what teachers do in the education sector as workers.

Some scholars describe teacher trade unions as organisations that heavily costs the department of education (Eberts & Stone, 1986). On the other hand, some education experts describe trade unions as progressive but disruptive towards the agenda to bring about educational reforms and quest for maintaining culture of learning and teaching in schools (Odhiambo & Hii, 2012). Furthermore, Loveless (2011) maintains that the presence of teacher unions in schools is the main cause of strained relations in schools. My conclusion therefore, is that trade unions in the education sector are critical social partners that must always be there to work hand in glove with the education officials to bring about positive reforms in the education system. This will help to minimise disruptions and strained relations in the education system.

1.6.3 Identity

The term identity is rooted from the Latin word "idem" meaning same (Erikson, 1968). According to Buckingham (2007) identity implies both similarity and difference. Deaux (1996) defines identity as the term used to refer to a sense of integration of self in which different aspects come together in a unified whole. Further, he defines identity as qualities, beliefs, personality, looks or expression that makes a person or a group. Therefore, in line with this study, identity is viewed as a set of qualities that make a person or a group.

1.6.4 Social Identity

Waters (1990) defines social identity as a term that refers to those aspects of a person that are defined in terms of his or her group membership. Bouman and Tester (2013) define social identity as a term that indicates who people are in terms of their usually defined physical, social and mental characteristics, e.g. race or ethnicity, gender, socio-economic status, sexual orientation, religious beliefs and so on. Therefore, in relation to this study one can conclude

that social identity refers to the individuals' characteristics that are reflective of his or her social group membership.

1.6.5 Role Identity

Role identity is defined as a character and role an individual devise for himself or herself as an occupant of a particular social position; it is an imaginative view of oneself as being and acting as an occupant of that position (McCall & Simmons, 1978). The Oxford dictionary defines role identity as a process by which a set of individuals interacts as a shared sense of identity or group consciousness. In this study the role identity is perceived as a set of characteristics individuals adopt and share in order to guarantee a sense of belonging and influence in a social group.

1.7 Location of the study

This study is located in two primary schools and one full service school. The two primary schools are situated in a semi-rural area called uMzinyathi and a full-service school is situated in Ntuzuma Township. All these schools fall under the education district of Pinetown in KwaZulu-Natal. The participants are principals of these schools respectively. The schools headed by these principals are situated in different contexts thus they operate in different complexities.

1.8 Outline of the chapters

This study is divided into six chapters:

- **Chapter one** introduces the study and presents an orientation. This includes the background to the study, the problem statement, the rationale for the study and research puzzles. Finally, the location for the study is presented.
- **Chapter two** presents two sections: literature review and theoretical framework. The literature review component provides the review of both local and international literature regarding the role of school principals and the role of union executive leaders in the education fraternity. The theoretical framework component presents two theories, namely social identity theory and relationship leadership theory.

- **Chapter three** presents the research paradigm, research design, methodology and the research methods utilised in this study. In addition, data generation, sampling and analysis methods are provided. Finally, trustworthiness and ethical issues applied in this study are presented.

- **Chapter four** presents the first level of analysis called narrative analysis. Here the re-storied narratives of the participants are presented. The re-storied narratives include early lives, upbringing, schooling career as well as the leadership roles of the participants. Their leadership roles highlight both the principalship and teacher union executive leaders.

- **Chapter five** focuses on the second level of analysis referred to as analysis of narratives. Here the paradigmatic process is utilised to deconstruct the re-storied narratives of the participants. As a result, six themes emerged from the re-storied narratives. These themes are presented in relation to the research puzzles.

- **Chapter six** brings the study to an end. Therefore, it gives the summary of the whole study. This chapter presents conclusions that emanated from the research findings. Further, it provides recommendations and implications for further research.

1.9 Conclusion

This chapter introduced the study and presented the background. The problem statement, the rationale for the study and the key research questions were presented. Further, the key terms of the study were clarified and the location for the study was pointed out. In the next chapter two components are presented, namely, literature review component and theoretical framework component.

CHAPTER TWO

LITERATURE REVIEW AND THEORETICAL FRAMEWORK

2.1 Introduction

In the previous chapter I introduced the study and to this end, I presented the background for the study, the problem statement, the rationale for the study as well as critical questions for the study. Apart from this, the key terms were clarified and synopses of chapters were outlined. This chapter is divided into two sections. The first section covers the review of related literature and the second section covers the theoretical framework.

In the theoretical framework (second section) I present two theories, namely, Social Identity Theory and Relationship Leadership Theory. These two theories served as lenses through which I saw and understood the studied phenomena.

2.2 Literature Review

In this section, I present the key debates that emanate from scholarly input about the history of teacher unions in South Africa, including the negative views about the contribution of teacher unions to the education system. I am also comparing the unionisation of school principals among United States of America, United Kingdom and South African education system. Although this study is about exploring principals who are also serving as teacher unions' executive leaders, I saw it fit to include the scholarly views on the role played by teacher unions in professionalising the education system, the working relations among teacher unions and also the professional development of school principals. Again, by making use of literature, I am comparing what is happening in United States of America, United Kingdom and in South Africa when it comes to teacher unions' involvement in school principals' development.

2.3 The history of teacher trade unions in South Africa

This study is not about teacher unions per se but I feel it is critical that the history of teacher unions is put to light. This will assist to put into context the originality and the reasons for their existence. This section will further highlight the negative views with regards to the existence of trade unions in South Africa. I believe this will assist us to understand whether South Africa needs trade unions or not. Furthermore, this will assist to have an informed view with regards to the notion of having school principals who are not only ordinary members of teacher unions but who occupy executive positions.

A trade union is an organisation and a medium through which power is sought to fight for the rights and the balance of power in the places of work (Arikewuyo, 2005). Trade unionism in South Africa started way back during 1800s. During that time trade unions were divided along racial lines and according to provinces. During 1800s teacher unions were mainly concerned with professional matters more than workers' rights (Burrows, 1986). The first teacher union called the Native Educational Association was established in 1879 (Chisholm, 1999). This black teachers' association was established to deal with political matters and the social issues in addition to educational and professional matters. The political matters of that time included the discriminatory salary policies and the pass laws. Subsequent to that more teacher unions were established to fight against Bantu Education Act of 1953 including all apartheid laws which were in place during the 1980s (Burrows, 1986; Moll, 1989).

Burrows (1986) argues that during mid-1980s the teaching profession consisted of about 32 teacher unions. Younger unionists of 1980s saw the need to infuse militancy in their endeavour to confront the apartheid government (Hartshorne, 1992). Therefore, it may be concluded that most African teacher unions' ideologies and approaches will never be the same with those of their white counterparts. This is evident to their conflicting perspectives regarding militancy and professionalism (Hyslop, 1996). All teacher organisations that regarded themselves as militant teacher unions met in the 1990s to form one single largest union in South Africa called SADTU whilst those who regarded themselves as professional organisations came together to form NAPTOSA (Hindle, 1991). NAPTOSA and other smaller teacher unions such as South African Teachers Union (SATU), Professional Educators Union (PEU), Suid Afrikaans Onderwys Unie (SAOU) and National Teachers Union (NATU) believe that professionalism comes first in the teaching fraternity and it remains a responsibility of teachers. SADTU on the other hand believes that the conditions of

work, workers' salaries and stable education system come first, and then the issue of professionalism follows (Heystek & Lethoko, 2001). This could be perceived as one of the reasons why school principals were sceptical to become SADTU members when SADTU was formed in 1990 (Mahlangu, 2013).

2.4 Dissecting the role of principals and the role of union executive representatives

The review of both local and international literature on the roles of principals and union executive members show resonance. Scholars agree that unions' duty is to defend the workers whereas school principals are representing the employer in the education system. Further, the scholars concur that both the department of education and the teacher unions have a huge role to play in the development of teachers including the school principals. (Leithwood et al., 2004) emphasise that principals need to be developed professionally to lead effective and moving schools. Ramagkotswa (2016) in his doctoral dissertation on the role of teacher unions in the appointment and promotion of teachers in public schools argues that teacher unions have a rich history of conducting developmental programmes for their members hence most schools that are headed by principals who are union activists or executive members are categorised as moving schools. Therefore, it is clear that the educational programmes and workshops run by teacher unions positively influence principals who are union activists in schools (Ramakgtswa, 2016).

The Nigerian scholars maintain that highly developed leaders successfully apply leadership principles to inspire and influence the team they lead in the organisation to improve productivity; therefore, this also applies in the case of the school principals as leaders of learning organisations (Uzohue, Yaya & Akintayo, 2016). This is in line with the view that teacher unions produce well-groomed school principals (Ramakgotswa, 2016).

The local scholars who are critiques of teacher unions raise a critical argument in respect to the positive contribution of teacher unions in schools. These scholars express the view that the introduction of teacher unions in South African schools led to the total collapse of the schooling and education system (Msila, 2014). This is based on the notion that the education department cannot make any progressive decision without teacher unions objecting (Msila, 2014). The same view is expressed by Mafisa (2017) in his study on the role of teacher unions in education in which he recommends that the department of education and teacher

unions have to forge cordial relationship in order to support each other in the implementation of all educational programmes including the developmental and monitoring programmes for teachers (Mafisa, 2017). Given the labour power possessed by teacher unions, the department of education does not have a choice but to collaborate with teacher unions otherwise the whole education system may collapse (Amoako, 2014). Mafisa (2017) revealed that South African Democratic Teachers Union (SADTU) and National Professional Teachers Organisation of South Africa (NAPTOSA) are dominating and controlling the Department of Education in South Africa. These unions are known about their withdrawal of labour in case of disputes with the employer. SADTU is regarded as the more disruptive teacher union than NAPTOSA due to her militant character. NAPTOSA is regarded as a more professional organisation than SADTU (Mafisa, 2017). It is common cause that both of these teacher unions pride themselves for providing developmental leadership programmes to the principals who are their members (Dlamini, Smit & Loock, 2014). These scholars imply that, in my view, schools that are led by their members are effective and functional. This implication dispels the view revealed by the study conducted by Mthiyane, Bhengu and Bayeni (2014) that poor performance in schools is caused by teacher unions.

2.5 Negative views about teacher unions

In dealing with negative views about teacher unions in the education system, it is critical to start by giving the background of such views as they appear in the public discourse. Poole (2001) argues that teacher unions are not concerned about the education of the learners rather they are concerned with the interest of the teachers as workers. Berube (1988) describes the character of teacher unions towards the learner's education as detrimental thus they possess narrow self-interest. Kingdon and Teal (2010) express the notion that teacher unions protect their members even if they are incompetent and unable to deliver work as expected. Further, Kingdon and Teal (2010) regard teacher unions as organisations that are costly to the education system hence they take away resources that are meant to boost learners' achievements. These scholars criticise teacher unions for their blanket approach in fighting for the incentives for teachers, which is contrary to the department's approach that incentives should be awarded to the deserving teachers based on merits. Teacher unions are further, perceived as interfering with the promotion processes of teachers as a result many schools are managed by union activists rather than competent managers (Ramakgotswa, 2016). This has

led to the unionisation and politicisation of the whole education system. The Department of Education, in most cases, finds it very difficult to come up with progressive educational reforms hence the principals who are trade union activists hamper them in favour of the union members' interest. This is identified by Sayed and Carrini (1997) as one of the critical factors that damages good relations between the department of education and teacher unions (Sayed & Carini, 1997).

Presently, the literature I have reviewed is silent in terms of positive roles played by unions in the education system. Instead, scholars foreground the negative political cloud found in the system which is assumed to be caused by teacher unions. This is evident in the claim made by Moe (2011) who maintains that "If public education is to escape the stultifying drag of unions' grip on the system and if the system, therefore, is to evolve into a new form that is better suited to provide quality education to children – it will happen only through reforms that weaken or eliminate unions' power in schools".

2.6 The unionisation of teaching profession

This section focuses on the unionisation of the teaching fraternity in South Africa and in some of the international countries. For the purposes of this inquiry, I am focusing on the United States of America and United Kingdom as representatives of the international countries.

2.6.1 Teacher unions in the United States of America

In United States of America teacher unions are blamed for the increased bureaucracy in schools, for blocking progressive policies and reforms as well as for downplaying professionalism in the teaching profession (Bascia, 1996). This comes as a result of teacher unions' major role in United States of America's (USA) education system. In this country teacher unions have strong influence in the process of policy making (Bascia, 1996). The schooling system is under the control of powerful teacher unions. The collaboration of all school stakeholders (teachers, administrators and parents) is the only acceptable way to go for making decisions in schools, however the strong influence of teacher unions through their

active members is always evident (Casner-Lotto, 1988). Traditionally, the area of decision making used to be the sole responsibility of the school principal.

The involvement of teacher unions in the decision-making processes is viewed by the education authorities and interested parties as derailing the educational reforms (Sayed & Carrim, 1997). As a result, school principals have no interest in teacher unions due to the fact that they regard teacher unions as not progressive, unprofessional and harmful to the education system (Sayed & Carrim, 1997). The involvement of teacher unions in USA schools is viewed by many as a causal factor of chaos and anarchy in schools (Bascia, 1988). The education authorities and teacher union critics perceive teacher union leaders as people who advance the agenda of their members whereas the school principals are viewed as people who pursue and protect the interests of the learners and the public at large. Bascia (1988) argues that most school principals feel uncomfortable to have teachers who are strong union activists in their schools' establishments. Those who are already in their schools' establishments are not favoured to be in the key committees that are responsible to discuss and contribute to the basic functionality of schools due to the fact that they view these teachers as being too loyal to their unions than to the goals and vision of the school. This often leads to an unhealthy contestation between the school principals and teacher union leaders.

The union leaders view school principals as part of the oppressor (the employer) at the school level as a result they are often found in loggerheads (Heckman, Scull & Conley, 1996). Most school principals feel that they have lost power to teacher unions (Casner-Lottor, 1988). Some scholars recommend that school principals should agree to work collaboratively with teacher unions for the benefit of the schools as learning organisations (Sayed & Carrim, 1997). Some authors suggest that school principals in USA should consider relinquishing their old and traditional attitude towards teacher unions and became active members of the unions in order to avoid the element of animosity and distrust between themselves and the unions (Bascia, 1994). Principals' union activism has a potential of helping them to swell the ranks of the unions which could eventually make them becoming part of the executive committees. Being executive members may give them power to influence the direction the teacher unions should take especially when dealing with professional matters and the transformation of schools in USA.

2.6.2 *The teacher unions in the United Kingdom*

Bolam (2000) describes working relation between teacher unions and the department of education in United Kingdom (UK) as good and characterised by professionalism. The teacher unions in UK enjoy total independence and freedom from the politics of the country. They are more professional than being political and militant organisations (Ribbins & Zhang, 2003). Teacher unions advocate the existence and empowerment of General Teaching Council that is responsible for the employment of teachers, professional code of ethics, and discipline in the teaching fraternity (Hoyle, 2001). The teacher unions in UK only exist to protect teachers' rights, ensure good conditions of service and negotiate decent salaries for teachers with the help of all interested parties in the country (Bascia, 2000). The teacher unions of UK have a strong belief that the education of the children has to be free from politics and thereby remains professionally run and managed (Reeves, Forde, Morris & Turner, 2003).

The lack of political ideology and strong unionisation of teachers in United Kingdom makes it easy for the school principals to be active union members and as a result, school principals are part of the decisions made at any level of the unions (Bascia, 2000). The teacher unions in UK regard all teachers as leaders hence they play a part in their development (Hoyle, 2001). In all developmental workshops conducted by teacher unions, professionalism is overemphasised. This assists to get rid of the confrontational situation between ordinary teachers and school principals. Ordinary teachers live with a positive belief that they are managers in their own right. An understanding between ordinary teachers and school principals make education authorities and school governing bodies to treat teacher unions as social partners in the education system (Bolam, 2003; Caldwell et al., 2003; Ribbins, 2003). The collaboration among the education stakeholders in UK levels the ground for the school principals to become active union members.

2.6.3 *The teacher unions in South Africa*

Teacher unions in South Africa have strong influence in schools since the mid-1990s. This became more glaring after April 1994 when the unionisation of teachers became a major development in the education system (Legotlo, Maaga, & Sebego, 2002). Zengele (2009) argues that the education and teaching profession are highly unionised in South Africa. This

scholar further suggests that about seventy percent of the work force in the teaching profession is affiliated to the militant union called SADTU and the other thirty percent belongs to the other smaller teacher unions, NAPTOSA being the largest beneficiary of the remaining thirty percent of the total education workforce (Zengele, 2009). The high unionisation of the teaching profession in South Africa came as a result of the critical collective agreements the department of education concluded with teacher unions, namely, the right to access to schools, the right to hold meetings in the workplaces and a full pay for time off for union activities (Msila, 2014). These collective agreements strengthened and cemented the level of understanding between teachers and school principals in the schooling system (Blase & Anderson, 1995).

The relationship between teacher unions and the education department in South Africa may be described as transactional or a give and take type of relationship (Letseka et al., 2012). Some scholars describe this understanding as based on power relations (Mncube, 2009). Letseka et al. (2012) argue that the agreements entered into by the Department of Education and teacher unions are causing commotion in respect to the functionality of schools in South Africa. This scholar is basing this argument on the fact that teacher unions' interest is always about increasing membership and salaries of their members (Coulson, 2010). This argument is supported by other critics of teacher unions as they maintain that teacher unions will always have political influence on educational policies in favour of their members' interests (Cowen & Strunk, 2014). The practical example according to these scholars is when teacher unions became too instrumental in formulating and supporting the adoption of the Performance Management Development System (PMDS) and Integrated Quality Management System (IQMS). These scholars maintain that teacher unions were instrumental when these two systems were adopted simply because both of them are linked to the progression of salaries for their members.

The South African teacher unions are perceived as very influential in the appointment of personnel in the key strategic positions in schools, especially the appointment of school principals (Diko & Letseka, 2009). Evidence to this is a huge public sector strike which took place in 2009. The unions, specifically, SADTU, protested against the Department of Education's reluctance to appoint two school principals who were highly preferred by SADTU (Zengele, 2009). The public learned with dismay that one of these preferred principals had eighteen years' experience as a school clerk and had only six years' experience as a teacher. The other preferred candidate was said to be a spouse of the executive member

of the same teacher union, SADTU and possessed just a lousy college diploma. These two candidates were competing with highly experienced and highly qualified candidates. The department was forced to succumb to the pressure of the union (Zengele, 2009).

Teacher unions in South Africa control the education system by making use of intimidation strategies (Fleisch, 2010). Notwithstanding the fact that most of the education officials are deployed by the unions to the positions of authority within the Department and they are forced to toe the line when the union speaks (Zingele, 2009). Therefore, the South African education system and schooling system is described as in the state of crises or national disaster owing to the destructive influence of teacher unions at all levels (Fleisch, 2010).

Fleisch (2010) suggests that school principals in South Africa are the most frustrated civil servants as a result some of them opt to leave teaching profession before they reach the retirement age of sixty-five years. *Business day (2014)* reported that almost 4000 school principals prefer to take early retirement than to reach age sixty-five due to the pressure put on them by teacher unions. On the other hand, teacher unions propagate that they are protectors of the rights of the education workforce including school principals and proponents of democracy in the education system (Msila, 2014). In addition, teacher unions are perceived by the school community as key role players in the proper functioning of schools rather than school principals, thereby most school principals of highly unionised schools feel useless, redundant and despondent due to the dictatorship caused by teacher union members in their staff (Msila, 2014).

Teacher unions appear to the eyes of the public as agencies that render school principals impotent and indecisive (Mahlangu, 2013). On top of that, some scholars suggest that teachers from different teacher unions in the same school view each other with suspicion which makes it hard for the school principals to provide effective leadership and ensure proper functionality of committees in their schools (Mahlangu & Pitsoe, 2011). School principals are even failing to forge unity among their staff members due to the fact that union activists emphasise the ideology of their unions thereby causing an unhealthy competition among the staff members (Mahlangu, 2013). Union activists in such schools prioritise the unions' visions more than the schools' vision or pedagogical issues. The eventuality of this unhealthy completion among union members, leads to the unnecessary tensions among the staff members and consequently the entire school collapses (Mahlangu & Pitsoe, 2011).

In some schools where there is strong presence of teacher unions the whole school management team (SMT) becomes dysfunctional (Heystek & Lethoko, 2006). These scholars maintain that the Department of Education authorities fail to rescue schools from the might of the teacher union. Msila (2014) argues that the activities of teacher unions do not only hamper the functionality of school principals and the SMTs but cause the dwindling of the culture of learning and teaching (COLT).

Block (2009) claims that the education system in South Africa performs badly due to the interference of teacher unions. This scholar further maintains that sixty to eighty percent of South African schools are dysfunctional. This view is manifested in the international evaluation tests, namely, Trends in International Mathematics and Science Study (TIMSS), Monitoring of Learning Achievement (MLA) and SACMEQ (Reddy, 2006).

2.7 Teacher Unions and Professionalism

Teacher unions and professionalism have always been under scrutiny to many scholars (Sayed & Carrim, 1997). These scholars maintain that teacher professionalism manifests itself in the pedagogical skills and curricular knowledge possessed by the teachers. Further, Wu, Cheung and Chan (2017) express the view that professionalism is not static hence the demands, expectations and requirements are often improved when reforms are made in the teaching profession. The reforms come with the change in power relations. The changes could mean more power or the halving of power to the teachers and schools which may make teachers to grow professionally or at a personal level (Wu, Cheung & Chan, 2017).

Hong Kong embarked on a programme of making drastic reforms in her education system which put enormous pressure on her education system (Wu, Cheung & Chan, 2017). The decision-making function was removed from National Department of Education and was given to schools. This move meant empowerment on the side of schools however; it bestowed some challenges on the teachers (Wu, Cheung & Chang, 2017). This example depicts a clear picture regarding the impact the education reforms place on the teachers' professionalism.

The term professionalism can never be understood without the two terms, namely, professional and profession (Ramokgotswa, 2015). This author defines profession as a calling and professional as the person who is a member of a profession, therefore, the term

professionalism speaks about the characteristics or qualities of an individual called a professional. This in a nut shell means that teachers including school principals should at all material times display professional qualities and conduct themselves in a professional manner in order to qualify to be called professionals. The code of professional ethics for South African teachers is explicitly stated in the South African Council of Educators Act No. 31 of 2000. The code of professional ethics dictates how teachers should conduct themselves in the teaching profession (DOE, 2000).

The teacher's strike which took place in 2010 put the entire name of the teaching profession into disrepute (Amtaika, 2014). This strike action is described as barbaric and tarnished the name and integrity of the teaching profession due to that, among other things, the union activists intimidated other teachers who were against the strike action and learners were left unattended in schools and as a result the preliminary examinations were aborted (Amtaika, 2014). This contradicts the expectation that teachers must preserve the good image and integrity of the department of education at all material times (Bush, 2007).

The professionalism in the teaching fraternity is being destroyed and tarnished by teacher unions (Biesta, 2015). The acceptable professional ethics should at least form part of teacher training in order to reclaim and promote professionalism in the education system (Maxwell & Schwimmer, 2016). Therefore, the expected professional behaviour of teachers should be taught in the teacher training Universities exactly as they are enshrined in the Act that regulates the professional conducts of teachers (Ungaretti, Dorsey, Freeman, & Bologna, 1997). This may bring back the culture of respect of the teaching profession as a noble profession. Teaching has always been regarded as the noblest profession thus people who go for teacher training were expected to conduct themselves in a professional fashion (Kerchner & Koppich, 1993). Dermir (2011) suggests that the professional bodies of teachers must remain independent and free from union infiltration.

Good leadership is linked to professionalism (Demir, 2011). The culture of learning and teaching (COLT) and good teacher leadership are highly dependent on teacher professionalism. Professionalism brings the culture of unity, collaboration as well as labour peace in schools (Parlar, Cansoy & Kilinc, 2017).

2.8 The relations among teacher unions in South Africa

Although this study has nothing to do with the working relations among teacher unions, in this section I feel it is critical to have the teacher unions' working relations scrutinised in order to put to light their separateness or togetherness in respect to their approach in dealing with the Department of Education. This would, in my view, highlight whether there is formal record of understanding among teacher unions regarding the notion of having school principals elected into their executive committees.

The literature I have read thus far indicates that teacher unions are not keen to work together in the system of education although their individual activities impact on the same education system (Mafora, 2013). Therefore, there is a dearth of literature regarding the work relations among trade unions in the education sector. The only thing I have established in literature is that teacher unions utilise different approaches to engage the Department of Education on labour matters. Eberts and Stone (1986) maintain that teacher unions in South Africa have different approaches in respect to dealing with the Department of Education. As a result these authors distinguish teacher unions into two categories, namely, the cooperative teacher unions and the non-cooperative teacher unions (Eberts & Stone, 1986).

In the international space the same categorisation made by Eberts and Stone (1986) applies e.g. in Australia some teacher unions regard themselves as more responsible for the advancement of the economic agenda, whilst on the other hand some regard themselves as the champions of labour rights (Kerchner & Koppich, 1993). Likewise, in Norway, the cooperative teacher unions pride themselves as pioneers of professionalism whereas the non-cooperative ones brag about their contribution in the effective and smooth functioning of the schooling system (Mausethagen & Granlund, 2012).

In South Africa there are ideological differences among teacher unions which are manifested in the power contestation between the cooperative teacher unions and the non-cooperative teacher unions (Eberts & Stone, 1986). As a result, the non-cooperative teacher unions believe that teachers are workers of the Department of Education whereas the cooperative ones view teachers as professionals (Eberts & Stone, 1986). Therefore, non-cooperative teacher unions always demand that the Department of Education must provide all learning and teaching material in schools (Eberts and Stone, 1986). Given these differences among South African teacher unions, it is clear that it will always be difficult for the South African teacher unions to keep good working relations.

2.9 The rationale behind the leadership development for school principals

Again, this study is not about the development of school principals but I see it is befitting to explore the rationale behind the development for school principals. This is informed by the view held by the largest and the most influential South African teacher unions that teacher unions play a pivotal role in the leadership development of school principals (Dlamini, Smit & Loock, 2014). Bascia (2000) argues that teacher unions have a rich history of conducting developmental workshops and a range of professional development activities for their members. Further, the argument advanced by Mthibe (2007) that South African school principals are not appropriately skilled. All these scholarly views motivated me to include this section in this study.

The schools become proper learning organisations if they are headed by properly skilled and developed school principal (Mthibe, 2007). Despite the negative views held by the public about teacher unions, the assertion made by teacher unions regarding their role in the development of school principals deserves the attention of all interested parties including the public hence this is vital for the enhancement of schools. School principals are critical public servants that deserve on-going professional development in the education system. This is informed by their three critical functions as identified by Mthibe (2007). These three critical interchangeable functions are: Manager, responsible for managing and controlling human, physical and financial resources; Leader, responsible for driving the school vision, school development and improvement, finally, Administrator responsible for the day to day running of the school (Gunter, 2001). Therefore, schools need to be headed by strong leadership that has capacity to create efficient and conducive environment for learning and teaching (Gunter, 2001). Well-developed principals equip teachers with innovative skills to become in charge of their own pedagogical skills development (Bascia, 2000).

After the dawn of democracy in South Africa in April 1994 the Department of Education decentralised the decision-making powers to school level (Bush, 2015). This increased autonomy and recognition of good leadership and management in schools (Bush, 2015). This further placed more authority, accountability and responsibility of making decisions on the shoulders of the school principal (Cadwell, 2003). Therefore, school leadership and management powers rest with the school principals in conjunction with school stakeholders (Cadwell, 2003). This is contrary to the principals' traditional responsibilities whereby they were responsible for the management of teaching and learning activities only. Bush (2009)

argues that principals' role gained momentum as a result of decentralisation of powers and removal of bureaucratic tapes. The role of school principals got new description due to the decentralisation of powers after 1994 (Naiker & Mestry, 2015). School principals' new responsibilities demand that they develop new skills and capacity to deal with critical management matters e. g financial management and engagement with teacher unions (Naiker & Mestry, 2015). In addition, school principals have the responsibility to run schools like businesses hence they are duty bound to come up with good marketing strategies for their schools to thrive (Naiker & Mestry, 2015). These new duties make schools more complex and difficult to manage than during apartheid times, hence school principals need to be developed on an on-going basis (Fenwick & Pierce, 2004). School principal have an extra responsibility to ensure collaboration and development among the staff they lead (Msila & Mtshali, 2013). Well-developed school principals should be reflected in their capabilities and the manner they project their thinking in performing their daily tasks (Msila & Mtshali, 2013). These scholars further maintain that well developed school principals instil hope and motivation among their staff members. The whole school, under the developed principal, becomes a well organised learning organisation in which everyone is equipped with relevant knowledge and teaching skills. Bascia (2000) argues that the learning organisations do not improve only in the area of pedagogy but they also improve in the adoption of new and innovative ways of doing things (Bascia, 2000).

2.10 Unions and the development of school principals

The development of school principals has always been at the centre of teacher unions' programmes (Bascia, 2000). This is owing to the fact that teacher unions have a standing interest in the proper management and leadership in schools. Teacher unions maintain the view that schools led by well-developed principals produce better results (Bascia, 2000). Further, the involvement of teacher unions in the development of school principals assists to mitigate gaps created by the abdication of responsibilities by the department of education (Mthibe, 2007). In view of the fact that teacher unions interact with school principals on regular basis, they understand their areas for development (Bscia, 2000). In addition, teacher unions have an obligation to service school principals as their members. Therefore, teacher unions' involvement in the development of school principals does not only enhance managerial and leadership skills of school principals but it also minimises labour disputes

between union members in schools and school principals. Furthermore, the functionality of schools improves (Msila, 2014).

In my endeavour to further scrutinise the development of school principals, I decided to include oversees countries. To this end, the development of school principals in United States of America, United Kingdom and South Africa is discussed hereunder. I think this will assist to accurately relate what transpires in South Africa and in other countries in the globe.

2.10.1 The development of school principals in South Africa

Mthibe (2007) suggests that school principals in South Africa are not appropriately skilled. Naiker and Mestry (2015) assert that in South Africa the development of principals is based on the in-service approach (INSET), and there are no stringent criteria designed for the appointment of school principals. Any teacher who possesses a diploma or degree is eligible to apply to become a school principal (Republic of South Africa, 1998). There is no prerequisite professional qualification for teachers aspiring to take up principal posts (Cadwell, Calnin & Cahill, 2003). In 2012, the National Minister of Basic Education, Angie Motsekga came up with the idea of competency certificates for school principals (Republic of South Africa, 2012). The competency certificate was meant to strengthen accountability and responsibility of school principals (Naidoo, 2019). This proposal was vehemently opposed by teacher unions (Naidoo, 2019). School principals' development remained the focus of discussion in South Africa (Bush, 2008). The education leaders and teacher unions held a robust debate regarding principals' development since 2007 (Naidoo, 2019).

The Department of Education has recently put in place the policy called South African National Professional Qualifications for Principals (SANPQP) aimed at raising professional standards for school principals (Republic of South Africa, 2016). This policy identified many fundamental principles that ought to inform the national qualifications for school principals and for the appointment to principalship posts. After a thorough engagement with the teacher unions, Advanced Certificate in Education: School Leadership and Management course (ACE: SLM) was put in place as a developmental programme for the school principals (Naiker & Mestry, 2015). The ACE course made a tremendous impact to the school principals who attended this course (Naidoo, 2019). Later, the Department of Education recommended that the school principals and all teachers who aspire to become school

principals should study an Advanced Diploma in Education: School Leadership and Management (ADE: SLM) (Naidoo, 2019). Some scholars maintain that the development of school principals is critical hence they also have a moral responsibility to create conducive environment for the development of the whole school community (Mthibe, 2007).

The teacher unions in their separateness organise their developmental workshops aimed at developing principals who are their members hence they pride themselves as champions of school principals' development (Dlamini, Smit & Loock, 2014). This is despite the view that teacher unions are stumbling blocks towards all developmental initiatives offered by the department of education (Mthiyane, Bhengu & Bayeni, 2014). The same view is revealed in the study on the urban schools in the Eastern Cape conducted by Msila (2014). The lack of collaboration between the Department of Education and teacher unions in respect to the development of school principals remains problematic in South Africa (Naidoo, 2019).

2.10.2 The development of school principals in United States of America

Lewis and Murphy (2008) maintain that school principals have to undergo professional and leadership development on continuous basis, namely, Continuous Professional Development (CPD) which should combine both learning on the practice and formal learning experience. United States of America (USA) implemented the developmental programme for school principals that combine experiential and formal learning that includes field work and projects (Lewis & Murphy, 2008). This is contrary to what teacher unions advocate. Teacher unions in USA advocate that developmental approach must be based on a notion called "teach the teacher" approach which includes the concept of conducting developmental workshops (Johnson, Donaldson, Munger, Papay & Qazilbash, 2009). Teacher Unions support the existence of American Federation of Teachers (AFT) that remains responsible for the running of the developmental programmes directed at school principals. These developmental programmes run by AFT increase school principals' participation in teacher unions' programmes (Bascia, 2000). This scholar argues that teacher unions do take the centre stage in the development of teachers, thereby playing a crucial role in ensuring that the teaching profession remains professional as expected.

2.10.3 The development of school principals in United Kingdom

Teachers in United Kingdom are highly unionised including school principals hence the teacher unions are playing a dominant role in the professional and leadership development of school principals (Bascia, 2000). Teacher unions play this role even though the Department of Education offers school principals a formal training that is meant to prepare teachers for principalship positions. These courses are offered by educational institutions and accredited by the Department of Education. These courses include the management of finances, theory of education as well as education law. These courses prepare and equip teachers with skills and knowledge needed when they apply to become school principals (Bascia, 2000). Therefore, all teachers participate (Bascia, 2000).

2.11 Theoretical Framework

In this section (section two) I present the theories I utilized as a framework to understand the studied phenomena. This study is underpinned by two theories, namely social identity theory and relationship leadership theory. Social identity theory helped me to understand personal and professional identities of the participants meanwhile the relationship leadership theory assisted me to clearly understand the leadership practices of the participants.

2.11.1 The origin of social identity theory

Social identity theory is the theory that was developed two decades before the development of both the current justification theory and social dominance theory (Tajfel, 1974; Turner, 1975). Scholars such as Jost and Banaji (1974) describe social identity theory as a theory that posed positive influence on their work. Therefore, the systems justification and social dominance theories were developed in order to supplement and integrate social identity theory, not to oppose it (Jost, Banaji, 1974). Some authors of social identity theory maintain that this theory could be interpreted into three components, namely, social-psychological component, systems component and societal component (Tajfel & Turner, 1979).

2.11.1.1 The social-psychological component

This component explains the cognitive and motivational processes that are responsible for a type of intergroup discrimination known as social competition (Turner, 1975). This social categorisation makes the most noticeable social identity like the evaluation of the self to be similar to the evaluation of the in-group (Tajfel, 1978). The group members are motivated by their self-esteem; as a result, the group adopts different cognitive and character identity management mechanisms (Blanz, Mummendey, Mielke, & Klink, 1988).

2.11.1.2 The system component

This component justifies the social-psychological component. It gives clarity whether the social competition may or may not take place. The system component points out three socio-structural differences, namely, the permeability of group boundaries, the stability of the intergroup status system and the legitimacy of the intergroup status system. It foretells about the social competition that would take place when group boundaries are impermeable. Further, it predicts the intergroup status system if it is unstable or illegitimate (Tajfel & Turner, 1979).

2.11.1.3 The societal component

The social-psychological component together with system component tells more about the processes that apply to all members of the group (Hogg, 2016). The scholars who are proponents of social identity theory assert that the processes cannot show up outside the specific contexts (Tajfel, 1979; Turner, 1996). As a result, social identity's hypothesis predicts about specific cases of intergroup behaviour only after the societal component has been taken into consideration. The status system and the groups in the societal components are described in terms of the historical background, cultural history, economic background as well as the political history of the social group. It is further defined in relation to the social reality of the group (Hogg, 2016).

2.11.2 Societal norms and societal value

The intergroup behaviour consists of the two aspects, namely, the societal norms and societal value. Societal norms dictate the relations of the intergroup against the predicted operations of the social competition. The societal value determines the potential of behaviour that creates or protects the level of the status of the in-group. This is dependent on the members of the groups regarding themselves as containing positive societal value (Hogg, 2016). Tajfel (1979) maintains that social identity tells beforehand about the social competition that could lead to intergroup commotion (Tajfel, 1979; Turner, 1975).

2.11.3 The features of social identity theory

There are three forms of intergroup discriminations in the social identity theory, namely, the realistic competition, social competition and consensual discrimination (Tajfel & Turner, 1979). The realistic competition is informed by the self-interest and it takes place when the group interest is conflicting with material resources (Turner, 1975). This is described as realistic conflict theory (Turner, 1975). The social competition is triggered by the social self-esteem and happens when there are no intergroup interest conflicts (Tajfel, 1975). In cases where peoples' perception about the group is correct and accurate, Tajfel and Turner (1979) describe this move as consensual status. This often takes place in a stable and legitimate intergroup status (Tajfel & Turner, 1979).

2.11.4 Role played by social identity theory in this study

Social identity theory assisted me to understand the personal and professional identities of school principals who are serving as teacher union executive members. This theory gave an explanation about these school principals' characters as influenced by the social groups they belonged to including teacher unions and teaching profession (Tajfel, 1981). Further, this theory posits the discourse these school principals used to define, evaluate and conceptualise themselves in relation to the social groups to which they belong (Trepte, 2006). This further, assisted to explain the discrimination that exists in different social groups these school principals found themselves in (Tajfel, Turner, Austin, & Worschel, 1979). These school principals were able to give a clear picture whether they perceived themselves as belonging

more to trade unions or to the profession in which they are employed as chief accounting officers and representatives of the Head of the Department of Education (Tajfel, Turner, Austin & Worschel, 1979).

2.12 Relationship Leadership Theory

Relationship leadership theory is a contemporary leadership theory which falls under leadership as a process perspective rather than leadership as a combination of traits or as certain behaviours (Avolio, Walumbwa & Weber, 2009). This theory is one of the eight leadership theories as identified by Cherry (2012) in his study about leadership theories and leadership styles. This theory is built on the discourse that leadership is a process by which leadership influences a group of followers with an objective to achieve predetermined goals or vision (Amanchuku, Stanly & Ololube, 2015).

The relationship theory stems from charismatic leadership theory (Amanchuku et al., 2015). It focuses more on the organisation rather than an individual and it considers the connection that exists between leaders and followers in an organisation (Stone, Russell, & Patterson, 2004). It makes a distinct contribution to the organisation with a clear purpose or motive (Echols, 2009). The performance of the organisation becomes priority number one in this theory (Amanchukwu et al., 2015). The organisational learning and outcomes are considered and valued (Amanchukwu et al., 2015). The special focus is dedicated to the development and capacitation of followers' intellectual abilities (Stone, Russell, & Patterson, 2004). In this way, the development of the followers in an organisation could be described as holistic because it is provided both at psychological and intellectual levels (Stone, Russell & Patterson, 2004). The leaders motivate and inspire their followers to such an extent that they reconcile the opposite orientation of their followers and organisational performance for the better good of the organisation (Yukl, 1999). Therefore, the relationship between leadership and followers is built and strengthened to accomplish shared goals and objectives (Yukl, 1999).

2.12.1 Role played by relationship leadership theory in the study

Relationship leadership theory assisted me to unearth the connection the participants (school principals) have with their subordinates in schools including their followers who are trade union members. Relationship leadership theory highlighted the motivation and inspiration provided by these school principals to the subjects they are leading in schools and at a trade union level hence this theory's perspective that leadership is a process that involves influence with a group of people toward the realisation of goals (Uhl-Bien, 2011). Relationship theory was relevant for this study hence it served as lenses used to scrutinise these participants' abilities and potentialities to engage and create connections with their followers. It also helped to frame the study as the participants increase motivation and qualities of morality in their followers. Furthermore, the participants' abilities to encourage their followers, individually and collectively to fulfil their potential were put to light by making use of relationship leadership theory.

Through this theory, I was also able to unearth relevant qualities such as confidence, extroversion and values the participants possess (Lamb, 2013). Consequently, the level of ethical character and moral standards of the participants were scrutinised with the help of this leadership theory.

2.13 Conclusion

This chapter comprised two sections. In section one I presented both international and local literature to highlight scholarly views regarding the role of school principals and the role of trade unions in the education system. In section two, I presented the theoretical framework I utilised as lenses to understand the studied phenomena. The theoretical framework consist of two theories, namely, social identity theory and relationship leadership theory. The next chapter provides the research paradigm, research design and methodology adopted in this study. Moreover, the chapter includes the method of sampling, methods used to generate data, methods of analysis, trustworthiness issues and ethical issues.

CHAPTER THREE

RESEARCH DESIGN AND METHODOLOGY

3.1 Introduction

The previous chapter comprised two sections. The first section presented the literature review or key literature debates on the role of school principals and trade unions. The second section presented two theories which were used to frame this study, namely, social identity theory and relationship leadership theory.

In this chapter I provide a detailed description of how the study was conducted. I focus on the research paradigm, design and methodology that enabled me to provide answers to the research puzzles. I also explain sampling methods I used to select participants, methods used to generate data as well as the procedures I employed to analyse the generated data. Furthermore, I present trustworthiness issues and the ethical issues.

3.2 Research paradigm

Thomas Kuhn (1974) coined the term paradigm from the Greek word "paradeigma" implying a plan, model or pattern (Klenke, 2008). Paradigm is a manner in which one views the world (Cohen, Manion, & Morrison, 2011). This is what drives a researcher towards the phenomenon (Cohen & Crabtree, 2006). Therefore, to conduct this study, as a researcher, I needed to study the phenomenon from a certain perspective (Cohen & Crabtree, 2006). This is based on the view that in order to understand social science, the researcher has to rely on a research paradigm (Klenke, 2008). There is a number of research paradigms researchers could position themselves within to explore people's lived lives, this includes among others, positivism, feminism, interpretive, critical theory or post positivism (McMillan & Schumacher, 2010). None of these paradigms other than the interpretive paradigm could enable me to understand the subjective interpretation of the participants' experiences regarding their two competing leadership roles, namely, a school principal and a trade union executive member.

For the purposes of this study, I located myself within the interpretive paradigm in order to understand the lived experiences of school principals who are also trade union executive members (Denscombe, 2003; Niewenhuis, 2010). The interpretive paradigm holds a view that individuals develop their subjective knowledge as they interact with the world around them (McMillan & Schumacher, 2010). This view is contrary to the positivists' assertion that science is the only epistemological tool that assists researchers to understand the world. Within the interpretive paradigm, the belief is that reality is subjective and there are multiple realities (de Gialdino, 2006). Owing to this belief, the participants in this inquiry divulged their experiences based on their social contexts thereby expressing multiple realities (Krauss, 2005).

3.3 Research approach

A research approach tells more about the path utilised to conduct this study (Mackenzie & Knipe, 2006). In this study, I chose the path of qualitative research approach. The qualitative research approach was deemed good for this study because it focuses on the meanings of words rather than on numerical data (Marshal & Rossman, 1995). This approach granted me an opportunity to choose from a variety of data generation sources (Cresswell, 2014). Qualitative approach is viewed as an umbrella term used to describe forms of inquiry that assist researchers to understand and interpret the meaning of social phenomenon within the natural setting (Gentles, Charles, Ploeg, & McKibbon, 2015). This was therefore, the most suitable approach for this study since it provides rich information and allows the use of variety of methods to conduct research.

Qualitative research promotes interaction between the researcher and the participants during the process of generating data. This helps to draw meaning from the relationships through interpretation of data (Creswell, 2014). Further, through qualitative research the researcher obtains insight into the experiences of participants hence the researcher gets rich descriptive data directly from the participants. In this way, a researcher can access a reality as embedded on participant's mental construction of objects that they engage with (Maree, 2017).

In this qualitative study, I explored the experience of participants holding two leadership roles, namely, their role as school principals and their second role as trade union executive committee members. The focus was on how these school principals negotiate between these

two competing leadership roles. This approach assisted me to get an in-depth understanding of this phenomenon (Marshal & Rossman, 1995), as I generated rich descriptive data which led to the deeper understanding of participants' experiences (Nieuwenhuis, 2010).

3.4 Research methodology

I adopted the narrative inquiry as methodology in order to explicitly understand the lived experiences of school principals who also serve as trade union executive members. Clandinin (2006) argues that the lives of human beings are characterised by stories related to their life experiences. In addition, (Lyons & LaBoskey, 2002) suggest that narratives help researchers to imagine, to see more finely, and respond to possibilities and vicissitude of other's lives, and engage in deliberative, ethical behaviour and make possible new meanings. Therefore, this suggests that life experiences of individuals are a rich source of knowledge which becomes a tool to shape the environment and new meanings to an individual. Clandinin and Connelly (2000) argue that the participants in narrative inquiry benefit because they are able to recall their experiences and social backgrounds. Likewise, both participants and I, in this narrative inquiry, were able to reflect on our experiences in order to come up with new knowledge that helped us understand the phenomenon under study better (Bell et al., 2010).

The narratives narrated by the participants in this study affirmed the view that narrative inquiry is central to the interaction of individuals (Richie & Wilson, 2002). This methodology motivated the participants to retrieve their past memories in respect to their social, political, professional and individual experiences (Clandinin & Connely, 2000). Apart from this, the narrative inquiry methodology assisted in educating both the participants and I, hence the whole research process was a developmental engagement (Delong, 2019). The participants and I in this study engaged collaboratively in agreed milieus over a period of time with an aim of achieving clear objectives of the study thereby strengthening our relationship (Clandinin, 2006). This kind of relationship is described by (Jenkins, Bloor, Fischer, Berney, & Neale, 2010) as a "we-relationship".

Narrative Inquiry assisted me to think narratively about this study's phenomenon and the participants' lived experiences. This way of thinking helped to cement collaboration between myself as a researcher and the participants in respect to time, in a particular place and in different social interaction with milieus (Clandinin & Connelly, 2000). In the process of my

engagement with narrative enquiry, my thinking was channelled within three thinking tools known as commonplaces, namely, Temporality Commonplace, Sociality Commonplace and Place Commonplace (Connelly, 2006). These commonplaces helped me to get rid of the dominant story about the phenomenon hence they directed my thinking in all stages of this inquiry, namely, framing the research puzzle, the field, and composing field texts.

The three commonplaces are significant in the narrative inquiry owing to the fact that they put to light different dimensions of an inquiry. Apart from this, commonplaces help to differentiate narrative inquiry from other research methodologies. Below I discuss these commonplaces in detail:

3.4.1 Temporality commonplace

Connelly and Clandinin (2006) describe the events under study as in temporal transition. When narrative researchers embark on temporal commonplaces they are directly dealing with the past, present and future of the participants. This includes the places or events under study. The significance of temporality in narrative methodology is embedded in the theoretical views of experience in which "formal quality of experience through time is [seen as] inherently narrative" (Crites, 1971). This is affirmed by the view that "we are composing and constantly revising our autobiographies as we go along" (Crites, 1971, p. 76). Kerby (1991) argues that time is not only about one's movement but it is also about the events that take place in one's life, therefore, temporality includes person's life experience. Some scholars maintain that temporality is in-built in an individual's living (Carr, 1986; Kerby, 1991). In this study, participants shared their comprehensive experiences of serving as both principals and teacher union leaders. In order to understand how they negotiated between these contesting roles, attention was paid to past, present and future during the analysis phase.

3.4.2 Sociality commonplace

In this study I dealt with both the participants and my personal and social conditions. In other words, I dealt with our feelings, our morals as well as our emotions. This includes the milieu and the events as they appeared in my participants' life experiences (Connelly & Clandinin, 2006). Sociality Commonplace is about understanding the social, cultural, familial and the

discourses (Connelly & Clandinin, 2006). Carr (1986) argues that understanding sociality commonplace remains a struggle that cannot be taken away from the participants' life experiences. This scholar, further, describes sociality commonplace as a struggle that consists of two aspects, namely, a struggle to live out or live up to a narrative and the struggle to make a narrative (Carr, 1986). This explains the view that as people we deal with our emotions and moral responses that shape our narratives or stories. In other words, the events and people we interact with in our lives shape our life experiences. This affirms that the thinking ability of both the researcher and the participants is influenced by the fluidity of the three-dimensional spaces.

In addition, sociality commonplace posits the relationship between my life experience as a researcher and the life experiences of the participants. Therefore, I, as a researcher cannot divorce myself from the "we-relationship" caused by narrative inquiry. As a result, sociality commonplace points out my relationship, as a researcher, with reality.

3.4.3 Place commonplace

Clandinin and Connelly (2006) established this third dimension called the place commonplace following their interaction and working alongside participants during their work with people of Aboriginal heritage and the nomadic people. Prior to the establishment of this dimension, only two commonplaces existed, namely, Temporality Commonplace and Sociality Commonplace. These scholars established this dimension as a result of reflecting on their own places that shaped their being as well as their knowledge systems as they were growing up in their rural province of Alberta in Canada (Clandinin & Connelly, 2006). As a result, they authored stories about their life experiences at different places such as school and university. These two scholars simply define The Place Commonplace as a "specific concrete, physical and topological boundaries of place, sequence of place where the inquiry and events take place" (Connelly & Clanndinin, 2006, p. 480). This definition indicates that every event occurs in a particular place. This is in line with the view that individuals, place and narratives are inseparable (Connelly & Clnndinin, 2006). In this study, participants were allowed to chose places where they felt comfortable during the process of data generation. This was done to ensure that they share their narrative freely. All participants preferred their office spaces.

3.5 Selection of participants

There are different methods of sampling, namely, purposive sampling method, snowball sampling method, quota sampling, convenience sampling method etc. In this study, I utilised two sampling methods to select the participants, namely, purposive sampling method and convenient sampling method. This assisted me to accurately gather data that contributed to the better understanding of the phenomenon (Tongco, 2007). Firstly, the convenience sampling method assisted me to select easily accessible and geographically closed participants. This sampling method became useful in this study owing to its affordability and easy character.

Secondly, the purposive sampling method assisted me to get knowledgeable and information-rich participants (Cohen, Manion & Morrison, 2002). Because this is qualitative study I had a choice to choose one of the two forms of purposive sampling methods, namely, targeted purposive sampling method and systemic purposive sampling method. Therefore, for the purposes of this study I chose to utilise the targeted purposive sampling method (Lapan, Quartaroli, & Riema, 2012). As a result, three well-informed school principals who are also serving as teacher union executive leaders participated in this study (Cresswell & Clark, 2011). Below I present profiles of the selected participants.

3.6 Profiling of participants

In this study I generated data from three participants. These participants are school principals of three different South African Public Schools, namely two Primary Schools and one Full Service School. All these schools fall under the same Education District in KwaZulu-Natal. The principals of these schools (the participants) also served as regional executive committee members of the same teacher union. The names of the participants, their schools and teacher union are not revealed in the study in order to observe the principle of anonymity. To refer to the participants and their schools, pseudonyms were used. The participants and their schools are presented in the table below followed by full profile.

Name of participant	Name of School
Mr Dumisani Mdlalose	Emandleni Full Service School
Mr Mandlenkosi Msibi	Nqobani Primary School
Mr Thulasizwe Goba	Isondo Combined School

Table 1: List of participants and schools

3.6.1 Mr Dumisani Mdlalose

This is the first participant named Mr Dumisani Mdlalose in order to observe anonymity principle. His age is between forty-nine and fifty-three. He is the principal of a school named Emandleni Full Service School for anonymity purposes. Mr Mdlalose has a total service of 24 years in the teaching profession and is in possession of a teachers' diploma. He has been a school principal since 2009 thus he has eleven years of experience as a school principal. Mr Mdlalose became a trade union executive leader for the first time in 1999 when he was still a post level one teacher (ordinary teacher). He is currently serving as a regional executive committee chairperson of one of the big teacher union in KwaZulu-Natal. His school, Emandleni Full Service School, is situated in Ntuzuma Township under the education district of Pinetown in KwaZulu-Natal. Ntuzuma Township is one of the townships that are highly engulfed by unemployment. His school is categorised as a quintile four school which is contrary to the Ntuzuma community poverty index. Most of the learners in Emandleni Full Service School live on the social grants.

3.6.2 Mr Mandlenkosi Msibi

This is the second participant named Mr Mandlekosi Msibi in order to observe anonymity principle. His age is between forty-six and forty nine. He is the principal of a school named Nqobani Primary School for anonymity purposes. Mr Msibi has a total service of 19 years in the teaching profession and is in possession of a B. Ed Honours degree. He has been a school principal since 2015 thus he has five years of experience as a school principal. Mr Msibi became a trade union executive member for the first time in 2004 when he was still a post level one teacher (ordinary teacher). He is currently serving as a regional secretary of one of the biggest teacher unions in KwaZulu-Natal. His school, Nqobani Primary School, is situated in a semi-rural area called Umzinyathi Settlement under the education district of

Pinetown. This is a no fee school and categorised as quintile three. Most of the households in this community are either headed by grandparents or single parented if not child headed. Therefore, most of the learners in Nqobani Combined School live on social grants.

3.6.3 Mr Thulasizwe Goba

This third participant is named Mr Thulasizwe Goba in order to observe the anonymity principle. His age is between forty-eight and fifty-two. He is a principal of a school named Isondo Combined School for anonymity purposes. Mr Goba has a total service of 25 years in the teaching profession and is in a possession of a post grad diploma in education. He has been a school principal since 2005 thus he has 15 years of experience as a school principal. Mr Goba became a trade union executive committee member in 2000 when he was still a post level one teacher (ordinary teacher). He is currently serving as a branch chairperson which qualifies him to become a regional executive committee member. His school, Isondo Primary School, is situated in a semi-rural area called Umzinyathi Settlement under the education district of Pinetown in KwaZulu-Natal. This is a no fee school categorised as quintile one. Most of the households in this community are either headed by grandparents or single parented if not child headed. Therefore, most of the learners in Isondo Primay School live on social grants.

3.7 The data generation methods

In order to ensure that the participants in this study are able to reflect on their lived experiences either good or bad, I decided to employ an unstructured interview as data generation method including two other supplementary methods, namely, collage inquiry and artefact inquiry. These research methods played a critical role in enabling the participants to elaborate more on their personal lived stories.

3.7.1 Unstructured interview

An unstructured interview was used in order to allow the participants to narrate their lived experiences as school principals who are also trade union executive members. Face to face

interviews were scheduled with the participants independently and the interview sessions were digitally recorded (Lankshear & Knobel, 2004). The participants and I enjoyed the direct verbal encounter since the interviews were held in a venue chosen by the participants themselves (Leedy & Ormrod, 2010). In order to ensure that the narration process flowed freely, I gave participants enough opportunity to narrate stories about their personal lives as a people, respectively. As a result, in the first session, the participants freely told more about their upbringing as well as the social groups they affiliated to.

On the second encounter the participants were asked to tell stories about their experiences as school principals and trade union executive members. The participants were at liberty to take their time in narrating their stories. As a result, the interview process took probably one hour to one hour thirty minutes each. Each participant was initially given a right to choose time and venue convenient to them for an interview. This guaranteed comfort on the side of the participants. The participant's narrated stories helped me to better understand their personal and professional selves. Therefore, the unstructured interview was the most relevant and accurate method I used to generate data for this study (Hatch & Wisniewski, 1995).

3.7.2 Artefact inquiry

Artefacts are defined as the historical resources or objects that are used to trigger participants thinking abilities in respect to their past events (Mitchell, 2011). In most cases these objects contain emotional and sentimental value in participants' lives and they provoked historical memories of the participants (Mitchell, 2011). Artefacts among other things include photographs or pictures. The artefact inquiry was utilised as a supplementary method to trigger the participants' memories of their professional aspect of self. To achieve this, participants were asked to identify from their office spaces an artefact that triggers important memories about their work as school principals.

3.7.3 Collage inquiry

The collage inquiry is based on visual arts. This technique also supplemented the narrative interview method; the collage inquiry was employed to generate data in respect to the personal stories of the participants in this study. This method assisted the participants to

accurately relate their personal life experiences. The collage inquiry is described by (Buttler-Kisber, 2008) as an art-based communication inquiry. This technique assisted participants to remember and accurately relate their personal life experiences. The collage involves cutting images from the magazines and affixing them on the chart (Buttler-Kisber, 2008). This technique played a pivotal role as the participants were able to remember most of the critical areas of their lives and portrayed these through images.

I personally helped the participants to understand how the collage would help to extract data for the study. The participants were asked to choose images from provided magazines and that better described them, both as school principals and as teacher union leaders. The participants were then asked to paste these pictures on the chart to make a collage. I further requested the participants to give an explanation regarding their choices of particular pictures or images for the collage. Following this, the participants were asked to relate their experiences triggered by the chosen pictures or images.

3.8 Data Analysis

Data analysis is a process of transforming data into findings (Patton, 2002). Analysing data also includes sifting raw and vague data from the significant one. On completion of the data generation, I created transcripts of each interview, collage inquiry and artefacts inquiry conducted. These transcripts were derived from the digitally recorded data. The transcripts then assisted me to rewrite the narrated stories. As soon as I completed the transcription of stories, I then read and re-read the narrated stories with an aim of identifying similar issues in the stories. Then, I started to engage with the process of analysing and interpreting data. I listened carefully to the audio tapes of the interviews. In other words, at this stage, I conducted analysis based on two approaches, namely, narrative analysis and analysis of narratives. Both narrative analysis and analysis of narrative approaches assisted me to better understand data without prejudice or bias (Onwuegbuzie, Leech, & Collins, 2012). In application of these two analysis approaches, I ensured that I did not leave out any useful data contained in the transcripts. The whole process of analysis sharpened my skills. Below I provide discussions of the methods in detail.

3.8.1 Narrative Analysis

Narrative analysis utilises narrative reasoning in its analysis (Polkinghorne, 1997). It relates to events, actions or happenings put together and arranged in such a way that they contribute to the reflection of the plot. The data here consist of actions and happenings put together as opposed to them broken down into different pieces. The collected descriptions of events are grouped together by means of plots. In other words, this analysis approach moves from elements to stories. This is a procedure through which I organised interviews, collage inquiry as well as artefact inquiry into coherent and meaningful stories. I put data together instead of separating it into different parts.

At this stage the events or happenings became very clear to make it easy to identify the items that formed part of the final results for the study. Spence (1986) calls this process the narrative smoothing. From the final results of the story I worked directly with the data elements by putting them in a chronological order. This assisted me to identify elements that made it to the final results stage. Then I made conclusions about the connection among the events or happenings by providing the "because of or in order to" reasons (Schutz & Luckmann, 1973). Finally, I used the plot to glue up the events of the story and constructed temporal patterned whole derived from chronologically arranged data (Stake, 1988).

3.8.2 The Analysis of Narratives

The analysis of narratives is a paradigmatic type of analysis since it employs paradigmatic reasoning in its analysis (Polkinghorne, 1997). In this approach data is examined with a sole aim of identifying concepts in a story hence in this approach data is made up of stories (Polkinghorne, 1997). It moves from stories to common elements or concepts. I used paradigmatic process to analyse collected data. Analysis of narratives works best in a database that contains more than one story. The researcher examines the different stories in the database in order to establish concepts that are found in all stories. Polkinghorne (1997) argues that there are two types of paradigmatic analysis of narratives, namely, the paradigmatic analysis of narratives that applies to data in which concepts are taken from previous theories and paradigmatic analysis in which concepts are inductively taken from data.

3.9 Issues of Trustworthiness

Lincoln and Guba (1985) suggest that the researchers need to pay more attention to trustworthiness issues when conducting a qualitative study. This is based on the view that through trustworthiness the researcher is able to convince the consumers about the accuracy and correctness of the study findings. This also includes the fact that the study is worthy to be trusted and it is of an acceptable standard (Johnson & Turner, 2003). A researcher has a responsibility to establish whether the narrated story is a true account or a fabrication. Pezdek and Taylor (2000) argue that fabricated accounts are distinctly different from true account; the true accounts have both schematic and episodic details whereas fabricated ones tend to contain mainly schematic details. Therefore, some scholars argue that "some form of widely-recognised evaluative guidelines for qualitative research is necessary in order to win wider recognition and acceptability for qualitative approaches" (Elliott, Fisher & Ronnie, 1999, p. 225). As a result, I used verisimilitude and utility principles to maintain trustworthiness for this study. Furthermore, I performed member checking process in order to afford participants as well as my peers a chance to establish veracity in respect to my final interpretation. This assisted me to ensure that the issues of quality and trustworthiness are maintained since these are critical elements for the acceptability for this study. These principles are discussed below.

3.9.1 Verisimilitude

Verisimilitude is defined as "a criterion for a good literary study, in which the writing seems real, alive and transporting the reader directly into the world of the study" (Cresswell, 2007, p. 250). This study, therefore meets verisimilitude since it has believability. In the causes of my interaction with the participants I understood their position and felt their emotions as they were telling their stories. As a result, I found the narratives told by the participants as having resonance with their leadership successes both at school level and union executive level.

In advancing verisimilitude, I embarked on the process called member checking. This process is critical in establishing trustworthiness. I performed member checking in two forms of validation, namely, audience validation and peer validation. This assisted me not to validate data only but also to identify fabrications and to restrain from bias (Loh, 2013). Riessman (2008) argues that "narrative is not simply a factual report of events, but instead one articulation told from a point of view that seeks to persuade others to see the events in a

single way" (Riessman, 2008, p. 187). This suggestion affirms my perception that stories told by the participants were not facts but they were just expressions from their point of view. Attesting to that view was the participants' attempts to convince me in such a manner that their articulations almost led to an unintended interpretation (Riessman, 2008).

Polkinghorne (1988) suggests that "Storied evidence is gathered not to determine if events actually happened but about the meaning experienced by people whether or not the events are accurately described". Storied texts serve as evidence for personal meaning, not for the factual occurrence of the events reported in the stories (Polkinghorne, 1988). Therefore, this convinced me that audience validation was a good gesture hence it gave participants an opportunity to get a fuller and rounder understanding in respect to my final interpretation of their narratives. Furthermore, audience validation process afforded the participants with an opportunity to make corrections where they were needed. With regards to peer validation, I sent the final research findings to my supervisor as well as my fellow Masters students at UKZN. This assisted me to ensure that the research findings were accurately refined. It is always advisable to perform member checking by utilising both audience validation and peer validation to ensure that generated data meets verisimilitude (Kvale, 2007).

3.9.2 Utility

Utility is the "ultimate test" used to verify the relevance, usefulness and truthfulness of narrated stories (Riessman, 2008). The stories narrated by the participants in this study have a pivotal role to play in the world of knowledge. The participants' narratives posit that personal and professional development plays a critical role in the individuals' leadership capabilities. As a researcher, I fully understood the participants' stories hence I strongly believed that their stories would also be understandable to the consumers. In other words their stories were interpretive, thus they were capable of making consumers to anticipate information beyond the narrated stories. Stories about the lived experiences of the participants were not only educative but they also served as guiding principles to me as a researcher as well as to the consumers of this study (Eisner, 1998).

3.10 Ethical Issues

The ethical issues are about good or bad, right or wrong ideas (McMillan & Schumachen, 1997). Therefore, as a researcher, I am obliged to take into consideration how does the purpose of the research, its contents, employed methods, reporting techniques and results adhere to ethical issues, principles and practices. Ethical principles are critical due to the fact that they grant the research both scientific and acceptable social character (Durrheim, 2002). In conducting this study therefore, I ensured that I observe acceptable ethical standards as recommended by the University of KwaZulu-Natal, i.e. making an application for the ethical clearance certificate from the University ethical clearance committee. As a result, the ethical approval with Reference Number HSSREC/00001903/20200 was granted by the University. In addition, a letter requesting permission to conduct this study was sent to the Department of Education authorities. Although the participants were school principals, they were also given letters in their capacity as school gatekeepers requesting permission to conduct research in their schools respectively. These included letters in their capacity as research participants explaining the need for the study, beneficence, data generation strategies, the right to participate including their right to withdraw at any stage of the study. Further, the participants' letters explicitly guaranteed the non-malfeasance and issues of anonymity or confidentiality (Cohen, Manion & Morrison, 2011). In that light, pseudonyms were used in the place of the real names of the participants in order to preserve anonymity and confidentiality. Maree (2007) argues that the right to privacy and the public's right to know often cause contradiction, therefore, the researcher has a responsibility to strike the balance between the right and confidentiality (Maree, 2007). Finally, the participants were requested to read and sign the letters of consent which is in line with the research code of ethics which states that the research should cause no harm on the person of the participants including that the participants should freely participate based on their consent (Welman, Kruger & Michell, 2005).

3.11 Conclusion

In this chapter I presented the research paradigm within which I positioned myself to engage with the lived experience of participants. In addition, the discussions of the qualitative approach, narrative inquiry methodology and research methods were presented. Finally, I

discussed trustworthiness and ethical issues applied in this study. In the next chapter I present the narratives of participants as a product of narrative analysis, the first level of analysis.

CHAPTER FOUR

NARRATIVES OF PARTICIPANTS

4.1 Introduction

The previous chapter presented a research design and methodology, which guided the process of this inquiry. This includes the interpretivist paradigm, qualitative design and the narrative inquiry methodology. Apart from this, the chapter discussed the methods of sampling, data generation, and analysis. This chapter presents the narratives of the participants, which are a product of narrative analysis (first level of analysis). The narratives capture their lived experience including upbringing, schooling career and their leadership roles both in the education system and in teacher unions.

4.2 Narrative of Mandlenkosi Msibi

4.2.1 My early life and upbringing

My name is Mandlenkosi Msibi. I was born on the first of September 1971 in the village called Marianhill. I am a product of a marital relationship, and I am coming from a family of four siblings. I am the first born in the family. My father (who is now late) originally came from Vryheid, but was moving from place to place as he lived on temporary jobs. My mother is a retired nurse. They met at Marianhill hospital. My father had come for temporary jobs and my mother was a nurse at the hospital. Given that my father was uneducated and lived on temporary jobs, we moved from place to place. My father passed away when I was nineteen years old.

4.2.2 My schooling career

4.2.2.1 Primary and Secondary education

I started my primary education at kwaMashu Township then moved to Ntuzuma Township and completed my Standard five (grade seven) in one of the Catholic school situated in Inanda informal settlement. This is where I started to perform some leadership

responsibilities. When I was doing standard five (grade seven), my school mates unanimously chose me to speak on behalf of all school learners in the farewell function of one of the teachers who was retiring that year. I took that task seriously in such a way that I thoroughly prepared myself. In doing research for my speech, I consulted a teacher who was my neighbour. After delivering my speech everyone including teachers were impressed. This built my confidence and I realised that I possessed some good leadership qualities.

In 1985, I started my secondary education in one of the best secondary schools in Inanda. After passing standard nine, currently known as grade eleven, my family moved to Vryheid. This compelled me to complete my matric in one of the schools in Vryheid. This is where I started serving in the Student Representative Council though I did not occupy a critical position. Serving in this structure confirmed that I would be a leader when I grow old. In 1989 I completed my matric successfully. In the same year my family came back to Durban and we resided in an informal settlement in Inanda.

4.2.2.2 Tertiary education

Residing at Inanda made it easy for me to enrol at the University of Durban-Westville to pursue a Bachelor of Pedagogics degree in 1991. This is where I started to get involved in students' political activities. I became actively involved in the student politics and social movements. I don't remember missing even a single student protest action at the University. I actively participated in all protest planning meetings. Unfortunately, I had to drop out from the University due to financial difficulties at home, and I was very disappointed. In 1993 again we returned to Vryheid and I fortunately got employment as a privately paid teacher in one of the primary schools. Working as an unqualified teacher assisted me to save money from the little that I earned. I then decided to continue with my studies through distance learning with the University of South Africa (UNISA). In 1999, I completed my Bachelor of Education Honours Degree and got permanent status as a teacher.

4.2.3 My experience in the mainstream politics

In 1999, I was recruited to join African National Congress Youth League (ANCYL) and became an active member and a leader of this political organisation of the young people. Owing to this, in the year 2000 I was elected into a leadership role as a BEC secretary. I served as a secretary from the year 2000 to 2006. During that time, the secretary of the BEC of the mother body was employed in the Department of Education as a circuit manager. This comrade mentored me in my journey in politics and ideology of the African National Congress (ANC). He taught me how to be a humble servant of the ANC. Among other things I learnt from this comrade is a skill of taking minutes of meetings. We used to drive around in his car delivering ANC circulars to the branch members. His confidence in me positively influenced what I am today.

In 2004, I became instrumental in the formation of the branch of South African Young Communist League, the youth wing of the South African Communist Party. Having noticed my political growth, some ANC leaders informed me that I was ready to lead at the level of the branch executive committee of the mother body. As a result, in 2007 I was elected into the Branch Executive Committee of the mother body, not only as a member but as a secretary. In this way I replaced my mentor.

By virtue of being an ANC branch secretary I was given a seat in the branch executive committee of the SACP. I have been in the leadership of the ANC since then. I am currently serving as a BEC deputy chairperson in our ward. I am also serving in the top ten in one of the ANC zones (sub-region) that consists of twelve branches.

4.2.4 My involvement in the teacher union leadership

Late in the year 2009 I was approached by some teacher union activists. These comrades requested me to come and lead at a branch executive committee level. This came as a surprise to me because I had never led in the union, even at a site level (site-steward). I only participated in the processes of electing site leaders. I was not keen to lead a teacher union because I feared the clash between teacher union activities and my political duties in the ANC and SACP. I used to refuse when comrades who knew me from the ANC were trying to recruit me into the leadership position of the teacher union.

It was brought to my attention that the comrades met in a caucus meeting to discuss the next leadership. I was told that my name was raised in that caucus meeting. These comrades agreed among themselves that I had a role to play in leading the teacher organisation in question considering my experience in the ANC and SACP. As a result, one comrade was sent to come and inform me that the decision has been taken that I should form part of the line-up that would contest in the up-coming elections. I was very sceptical but I agreed to engage with the comrades in honour of their request. I was defeated in the engagement meeting hence I ended up agreeing to contest the elections. Subsequently, I was elected as the head of Sports, Arts and Culture portfolio in the branch executive committee.

This chair (artefact) reminds me of positions I have held at various levels of the union. I led at a branch executive level for two terms before graduating to a regional executive level in 2013. This is my fourth term as a regional leader. In the regional executive committee, I started by being the head of Sports, Arts and Culture portfolio. I then proceeded to the Deputy Secretary position and later became a Full Time Shop-steward. I am currently serving as a Regional Secretary. The leadership experience I accumulated both in the mainstream politics and teacher union makes me to ponder and affirm that indeed experience resembles a comfortable chair on which one sits to observe when positive outcomes are realised.

Figure 1: Mandlenkosi's artefact

4.2.5 Leading a school as a principal who is also a union leader

I did not get an opportunity to become a head of department and a deputy principal. In 2014 I made an application for a principalship position which I was lucky enough to get it. In other words, I moved straight from being a post level one teacher to principalship level.

I can confirm that teacher union background assisted me hugely when I became a school principal given that I had no management experience. When I became a principal, I had a clear understanding of what was expected of me as a visionary and progressive leader in a

teacher union. I knew exactly how to influence people under my supervision. I had learned this from leading a teacher union. I was well conversant with all the demands of professional ethics, pieces of legislation governing the Department of Education including the chamber resolutions. This was based on the knowledge I acquired from dealing with labour matters in my role as a teacher union leader and the developmental trainings provided to us as union leaders. This made it easy for me to capacitate teachers under my supervision. As a result, I am proud that they are well aware of all education imperatives including the issues of discipline and consequences of misconduct.

Effective time management is key in successfully performing my principalship duties and my union duties. When I am at work (school), I fully and honestly represent the Head of Department. I remain a professional implementer and protector of the decisions of the employer, the Department of Education. I use agreed time offs to attend to teacher union activities. My union activities do not interfere with my principalship duties. My position as a school principal comes first in my list of priorities. I believe in the view that I lead teacher union because I am employed as a teacher.

 I strongly believe in effective communication, transparency, openness and proper consultation. These values keep the school community united around one vision and mission. In my school decisions are taken democratically hence everyone feels involved and enjoys a sense of belonging. These attributes increase the sense of trust between the staff members and me. Moreover, I jell well with my deputy principal and the entire School Management Team.

I dedicate much time in doing school administrative work in the afternoon after everyone has left. This makes it possible to do my managerial duties effectively and efficiently. It feels good to observe that teachers consider themselves protected and secured under my supervision. I believe this is due to the fact that I use staff meetings and briefings to empower them with current labour issues and other relevant information. My close proximity to the decision making processes in the education system keeps me well informed. This by extension includes teachers under my supervision.

4.2.6 Drawing from union leadership experience to lead a school

Being a union leader has assisted me to understand how to deal with sensitive issues of the teachers as workers. I have learnt that teachers are essential workers in their own right.

Without their effort, the school is likely to be ineffective. I carefully acknowledge this in the manner I conduct staff meetings. Leading in the teacher union has taught me that everyone in a meeting should be made to participate actively. This could be made possible if all participants are treated fairly and as equals in meetings. Therefore, correct meeting procedures have to be applied without fail.

Correct meeting procedures form an integral part of union none-negotiables. This helps to ensure that every decision taken is owned by every single member of the organisation. So, chairing meetings and decision making are some of the critical skills I acquired from leading in a union. Another thing, I learnt from union is that I should not feel offended if participants in a meeting raise issues that are contrary to my points of view. It also taught me to robustly engage with participants in the meeting until the common ground is found. The common ground is achieved through debate and persuasion only. In that way the participants feel involved and respected in my meetings. This is irrespective of how thorny the matter under discussion might be. Therefore, leading in a teacher union sharpens me to remain a better school principal.

I have reached a stage where I am confident that it is unlikely that teachers in my school could commit misconduct cases because they know better than teachers working in other schools. Teachers in my school are always keen to impress me as their leader. In that way I enjoy both trust and confidence from my teachers. It is my considered view that teachers respect that I am well conversant with their poor working conditions and difficulties. As a result, I speak with authority and confidence when I address. It is not easy though because this is not as smooth as I anticipated. Some of my fellow union members within my staff attack me. They question my posture towards the Departments of Education's non-negotiables. They end up questioning my union credentials including my political background. Questioning my union credentials help them to advance their argument that my behaviour does not reflect that of a union regional leader.

Through my influential skills acquired from leading a union, I succeeded to instil the spirit of oneness and professionalism among the members of the staff. I inspire them to implement the department's non-negotiables which we call revolutionary duties or revolutionary tasks in the trade union. Teachers under my supervision understand that when they are at work they are expected to teach an African child without any reservations. They know that I expect them to conduct themselves in an exemplary manner both at work and outside work environment. I

make teachers to understand that they might be the only role models of their learners who spend five of seven days in a week with them. In that way they have to be at work on time and be on task on time. All this has assisted me to be able to forge cordial relationship with the whole school community. It is against this background that I often say that my school is one of the most effective primary schools in the district.

As a school leader

As an employer

Interacting with parents transparently

Staff Meeting

Unity and collaboration in the SMT

Learners under care of a good leader

Leading Teacher Union Activities

4.3 Dumsani Mdlalose's narrative

4.3.1 My early life and upbringing

I was born in the outskirt of Inanda in the rural area called Machobeni in the year 1970. I was born in wedlock. My mother is a retired domestic worker and my father who passed away in 2003 was a driver in one of the companies around Durban. I am the last born in a family of three siblings, two girls and one boy. Although there were financial difficulties at home, my parent brought us up well. As a result, my siblings and I are teachers by profession, sadly one of my siblings passed away in 1990.

4.3.2 Looking back at my schooling years

I attended both primary and secondary education in schools situated at Machobeni. I noticed at a primary school level that I was trustworthy in the eyes of the people around me especially the teachers. My class teacher used to give me a task of writing down the names of all those who were misbehaving in the classroom when she was not in class. I was also responsible for looking after her valuables such as her hand bag. It did not come as a surprise when I was elected as the first president of the newly formed structure called Student Representative Council when I was doing standard nine (grade eleven) at secondary school level. That is where I think my leadership journey began.

In the year 1989, I completed my matric. I often describe this year as a turbulent year in the political history of South African. The violence caused by the then two South African rival political parties, namely, Inkatha Freedom Party (IFP) and the United Democratic Front (UDF) affected my schooling career negatively. The political instability at Machobeni compelled me to run away and lived in one of the nearby townships called Ntuzuma. I travelled all the way from Ntuzuma Township to Machobeni to school to complete my metric.

4.3.3 My life experience after matric

My political activism dates back when I was doing standard nine (grade eleven). At this stage I was already a political activist affiliated to UDF. This is what caused me to run away from Machobeni and lived in Ntuzuma Township when I was in matric. My parents' house was situated at the border between Emachobeni and Lindelani Settlement. Lindelani Settlement was a strong base of the IFP whereas Machobeni was dominated by UDF supporters and activists. Therefore, by virtue of being a young influential and vibrant activist affiliated to the UDF I became a number one target for the IFP. As a result, in the year 1990 my family house was petrol bombed. Fortunately, no one got hurt. This attack followed a speech that I made in the funeral of one of our comrades. The attackers did not know that after making a speech I went straight to Ntuzuma. This attack made me very popular among young political activist. In 1991 I was elected to a chairpersonship position of South African Youth Congress (SAYCO). I held this position until I went to the college of education in 1993.

4.3.4 My tertiary education

In 1993 I enrolled at Madadeni College of Education to train to become a teacher. This was after a gap of three years. My parents fully funded the first year of my tertiary education. In the year 1994 the Department of Education offered me a bursary that financed my education up to my completion in 1995. In the same year I became the President of the Student Representative Council until 1995. This coincided with the election of the first democratically elected South African government.

Madadeni College of Education is one of the previously marginalised institutions, for example, the progressive structures, namely, South African Students Council (SASCO) and Student Representative Council (SRC) were not recognised by the management before 1994. Therefore, as the SRC President I had a responsibility to make sure these structures become functional and operational within the college. This was the beginning of the transformation of the whole institution. I believe that I left a good legacy for myself at Madadeni College of Education in 1995.

4.3.5 A young and energetic novice teacher

In 1996 I started to work as a teacher in one of the secondary schools in KwaNongoma, the Northern part of KwaZulu-Natal. I was recruited to this school by a comrade that was my deputy in the SRC at the College. This was a difficult time to the newly appointed teachers because the processing of salaries took a few months.

I became very active in the academic work within the school. This sped up my professional growth. I participated in different subject fields. I enjoyed this because I was young and energetic. There were other six new teachers who were of my age group whom I competed with on the academic duties. We had a healthy competition though because it was aimed at benefiting ourselves and the learners. This competition fuelled our energy in all matters of the school including the sporting activities. As a geography and history teacher, I ensured that I availed myself to all developmental workshops organised by the Department of Education. I also learned a lot from the senior teachers within the school. Staying in the school cottage also made it easy for me to collaborate with senior teachers. I would keep myself engaged in teaching activities even after school hours and during Saturdays and Sundays. Due to my dutifulness in the academic and sporting activities within the school, I found myself playing

many leadership roles within the school. I became the chairperson of the curriculum committee, a sports organiser and the secretary of the School Governing Body.

4.3.6 Reflecting on my trade union

I became very instrumental in the introduction of a teacher union within the school thus I was elected the first site-steward. The teachers we recruited at that school were not unionised before our arrival. Becoming a site-steward did not deter me from my teaching responsibilities. I remained a highly committed site-steward. I had held the view that teaching is a noble profession. I maintained that children under my care were coming from poor families thus education was the only tool available to move them out of poverty. I also discovered that the same notion is enshrined in the teachings of the same union. It also inspired me to learn that its mission and objectives, namely, to ensure that teachers stay united to fight against any form of discrimination, sexism and inequality as well as to better the working conditions of all teachers as workers are in line with the politics we grew up with in the UDF.

It also motivated me to learn that the same union applies revolutionary strategies and professionalism in dealing with the labour issues. As a young, energetic and progressive teacher I found a second home in the union. After few years I realised that the members on the site (school) and outside the school regarded me as one of the knowledgeable and revolutionary site-stewards.

In 1997 the first branch biannual elective meeting was held and I was elected as a new branch secretary. I remain the first Nongoma branch secretary of the now biggest teacher union in South Africa. This, to me, was a graduation to a senior leadership position in the union. By virtue of being the branch secretary, I became one of the first members of the then new regional executive committee. We gave it a name the Inland Region. I played a vital role in the process of coming up with the name Inland Region. It was not an easy task though, to service schools in the Inland region due to the distance among schools. However, I managed to market the union and recruited numbers of teachers under the circumstances.

4.3.7 Ascending to school management was a rocky path

In the year 2000 I was promoted to a position of the Head of Department in one of the schools situated in the border between Ulundi and Nongoma. This school was within the same branch that I was serving as a union branch secretary. Therefore, taking up this position did not take away my position in the union. I performed my duties as the Head of Department in my new school including that of a teacher union without compromising the responsibilities attached to each of these positions.

Ulundi and Nongoma were known strongholds of the IFP and the popularity of the union under my leadership caused a problem for me as a person. In the year 2001 I was summoned to an IFP special meeting that was held in one of the well-known teachers' college in the area. In that meeting, the IFP leaders made it clear to me that I should leave Nongoma within five days and go back to where I originally came from in order to save my life. These leaders accused me of spreading and promoting an unacceptable political ideology in the IFP led community. After receiving honest advices from some teachers and comrades I decided to report the matter to the Department of Education and to my senior union leaders. A consensus was then reached that indeed my life was in danger and that I should leave Nongoma. The department placed me in the list of displaced teachers and promised to place me in one of the schools around Durban.

In September 2001 the department of education in consultation with my union decided to place me in one of the schools in Inanda. I assumed in this school as a Head of Department in the senior phase. I served in that school as a HOD until I became a principal in 2012 after my application to succeed my retired principal was successful.

4.3.8 My contribution as school principal

The record of being a capable and affective school principal is well documented in the history books of that school. I transformed it from being a senior primary school to a secondary school. The first matric I produced got a pass rate of ninety eight percent which improved to one hundred percent in the subsequent years. In the year 2013 we became one of the celebrated schools in the circuit. I am no longer in

Figure 2: Dumisani's Artefact

that school but the foundation I laid still keeps the school shining. I used the power of a *pen* instead of aggression to enforce the culture of teaching and learning. This made me to realise that teachers respect an instruction issued in writing. The systems I put in place in that school yielded positive outcomes hence the good matric results on a continuous basis.

4.3.9 The resuscitation of my union activism

In the year 2003 (two years later) I was elected as a site-steward in the same teacher union. I served in this position from 2003 to 2008. In the year 2008 the site-stewards council nominated me to become one of the branch executive committee members. I accepted the nomination. Indeed, the branch elective meeting was held in March 2009 and I was elected a branch deputy chairperson. This, to me, meant the resuscitation of my political activism because the same thing happened at a community level. In the same year I was also elected as an ANC branch treasurer. This meant the re-opening of another chapter of my leadership experience. I led since then up to date. I have led at branch level for three terms in various portfolios, namely, a deputy chairperson, a secretary and a chairperson

In 2017 the deployment committee of the branch informed me that they decided to push my name in the next regional elective conference so that I become the next regional chairperson. As a tried and tested leader of the union I agreed to avail myself. Indeed, I won the elections uncontested and became the regional chairperson of one of the biggest regions in the province of KwaZulu-Natal. This region consists of twelve big branches. This is the position I am currently holding. As a regional chairperson I sit in the Provincial Executive Committee. If I look back and calculate the number of years I have spent leading in the union I conclude that I have a total number of twenty-four years' experience.

4.3. 10 Employing tougher approach to people management

In the year 2016 I re-applied to become a principal of a big Full-Service School. My application was informed by the fact that I had done all I could do to transform my previous school to put it to its current form. I needed a new challenging environment. This became a reality because a full-service school's major function is to support other mainstream schools.

Moreover, it is situated in the township, an environment that I was not familiar with. All my teaching experience had been in rural areas.

The new environment caused me to change to a new tougher people management approach. I found a high level of laxity on the side of the teachers. They did not know when did the school start and end. They performed their duties as if they were doing a favour to the learners. I had to put my foot on the ground in order to turn things around. In the process of correcting all misdemeanours I became unpopular to most staff members, some questioned my credentials as a union leader. They described me as an exploitative union leader. I expected such reaction and I soldered on until the majority understood that all I wanted was to see them doing their work as expected. The culture of teaching and learning set in and the school turned around. Everyone now is happy about the state of affairs in school. The school is now one of the most effective schools in the circuit.

Every member of the school community now knows that they have to be at school before half past seven because the bell rings exactly at half past seven for the schooling processes to begin. The knock off time is half past two but no one is allowed to leave before all learners have left the school premises. They all know that they are expected to teach in line with their duty loads. I strategically introduced compulsory onsite staff developmental programmes. I used my influence as a leader in the union to coerce everyone to take these developmental programmes seriously. This is what keeps me confident that everybody in my school shares the same vision. We collectively adopted a motto that says "we are workers first before we become union activists". This is an indication that we now collectively share the same vision.

To achieve total change was not as smooth as one would love. I encountered huge difficulty to introduce new ways of doing things. I could observe that some influential members of the staff held the view that I was moving away from the principles of comradeship. They thought I was being exploitive to them. Some were even gossiping in corridors that I was selling out the struggle of the workers to the employer. They threatened to vote me out of the office of the union. This view spread out to the entire membership of the branch where the school is located. Some comrades from outside my school approached me in confidence in order to find out as to why I was exploiting the workers. I used to tell them that after few months everyone would realise what I was doing. The aim was to transform the school for the better.

Indeed, within no time they began to understand my position when the good outcomes were forthcoming. The enrolment increased dramatically because we gained new trust from the

community. The teachers including other interested individuals began to say "Yes our principal is a good leader". It is an undeniable fact that when I arrived the school enrolment was lower than it is presently. Today the employment of my teachers is secured. No one gets to a state of panic when the post provisioning norm (PPN) matters are discussed. Our school has become a first choice to the community. Our leaners do not leave our school without a valid reason instead we are often confronted by a long list of learners intending to enrol into our school.

4.3.11 Maintaining the balance between leading in the union and leading a school

Contradictions often exist in the eyes of the people regarding my two roles in the teaching fraternity, namely, leading in the union and leading a school. People fail to understand that managing a school needs proper systems in place to provide the strategic direction to achieve the intended results whereas leading in the union needs political direction to implement the given mandate. As a school manager I identify, support and fund school programmes. For the school programmes to unfold they need proper systems in place. Proper systems enable the programmes to flow like a well-oiled machine if they are understood and owned by everyone. This is all I do to keep the school effective and efficient. I utilise all resources, namely, human resources, financial resources, properties and assets to ensure the flow of school programmes. I have observed that teachers enjoy serving under a principal who is a leader in the union because they know that such principals manage programmes rather than individuals. Most unionised teachers believe that union leaders make good school leaders because, like I do, they empower, capacitate, defend and protect teachers from any form of abuse and exploitation. I am adamant that teachers under my supervision feel safe and secured in my presence. In the process of protecting teachers, my duty to ensure discipline and order within the school does not get neglected.

To minimise chances of clashes between the two roles I ensure that my responsibility of being the representative of the employer does not get compromised. In doing this, I make it to a point that the policies and decisions of the department get implemented without exploitation of teachers. I apply democratic principles as espoused by the union and in the process, I ensure that they do not form basis for chaos and anarchy in school.

Decision making is a management function however; as I was taught in the union, I conduct proper consultation before I decide. This helps to guarantee the involvement of everyone in the organisation. This is a recipe to keep the school functioning smoothly. In this regard I prioritise bilateral meetings with the site-committees of both teacher unions, individually or collectively. I listen carefully to the views of the staff. In the end, as the final arbiter, I act decisively.

Apart from my principalship duties I am expected to provide political leadership in my capacity as a leader in the union. This is the critical part of my leadership roles because teachers often display different expectations. Some expect me to be lenient in the implementation of policies of the department. On the other hand, some feel obliged to comply without complaints to the instructions as a gesture of being loyal to the union. Both perspectives work in my favour when discharging my leadership duties.

4.3.12 The challenge I faced in my duel leadership roles

In 2019, for the first time after 23 years as leader in the union, I found myself confronted by a misconduct case that forced me to choose between my two leadership roles. This case came to test my loyalty between my position as a regional chairperson of the teacher union and my role as a school principal. One of the female leaners in my school reported through her parents that one of the male teachers, whom I led with in the ANC, had sexually assaulted her. More learners came forward to testify that the same teacher is notorious of assaulting female learners. The contradiction aroused because the same teacher was an active member of the union I am leading as the chairperson. The situation compelled me to deal with the matter as a school principal. I decided to take off the cap of a regional chairperson of the union in order to handle that matter with sensitivity it deserved. I formally charged the teacher and referred the matter to the relevant education officials who decisively dealt with the matter. I presented the case in such a way that there were no loop holes. As a result, the teacher in question was dismissed without the union representation.

4.3.13 How do I relate with the parents and community where my school is located?

Most of the values I possess as a school principal are an inheritance from the teacher union. These include open communication, transparency and honesty. These values strengthen my relationship with the parents and the community at large. The community understands me as a person who does not compromise with the teaching time. That is what they want to see for the education of their children. Parents do not need to be highly educated to understand quality education for their children. This is the reason why they chose our school to send their children to. The admission period of our school ends strictly on the thirty first of October every year in order to ensure that our school does not run out of floor space. This helps to control our intake. Otherwise we will find ourselves admitting from January to December. Our school is in demand in Ntuzuma Township. It encourages me to hear community members talking positively about the school. Most of them often discourage me to apply for higher positions so that I remain their principal.

Despite my dual leadership roles, I am confident that I am one of the best principals in KwaZulu-Natal.

Neat school reflects quality education   *The true representative of the HoD*

An interactive SMT Meeting

Providing leadership to the Staff Members

Addressing union members

Leading union activities from the front

4.4 Narratives of Thulasizwe Goba

4.4.1 My upbringing

I was born in 1974 in one of the poverty stricken rural villages under Ndwedwe local municipality called Maphephetheni. I am a last born among seven siblings. Both of my parents were illiterate but loved education. My father passed away in 2008 and my mother passed on in 2016. Growing up was not easy due to poverty within the family. My father was the only person who was working. His work was not paying enough to sustain our livelihood because he was working as a garden boy for an Indian family in Phoenix. My mother was a house wife. She was, however, able to provide food through her subsistence farming projects. Despite the level of difficulty posed by poverty to my family, at no stage did we sleep without a plate of food on the table.

4.4.2 My primary and secondary education

I attended my primary and secondary education in schools situated in Maphephetheni Village. Both of these levels of my education were funded by my elder siblings. When I was doing standard nine, I became one of the ring leaders of protest actions that led to the formation of student movement that fought against the payment of school fees and the wearing of school uniform. This was the time of violent political climate in the country and I was already politically active. The school principal got unhappy with my activism and decided to expel me from school. After my expulsion my parents and my sibling realised that my life was not safe in the area because it was already engulfed by political violence. They decided that rather than staying at home and doing nothing I should go and enrol in one of the privately owned secondary schools in town.

When I was doing matric I met many other comrades who ran away from their areas due to their political activism and violence. This strengthened my love for political activities but did not shift my focus on academic activities. One of the teachers who were originally from Ghana noticed that even though I was politically motivated, I liked school. He then decided, without informing me, to keep me occupied with the school work. He asked me to assist him in teaching some of his mathematics lessons because he was struggling to pronounce English language correctly. This task contributed hugely in passing my matric with distinction in 1992. This distinction pass made me to qualify to move to tertiary level.

4.4.3 My tertiary education

When I was doing matric I did not bother to apply for tertiary education because I knew that my family could not afford to take me to the University. My English and Guidance teacher made an application on my behalf to one of the former Indian colleges of education. After an entrance interview the college informed me that I was taken. The struggle for funding began at the beginning of 1993. I then informed the college that I was declining the offer due to financial difficulties. To my surprise, after engaging with my results the college offered me a bursary for a four year study. The bursary would cover both tuition and accommodation. As a result, I completed my Secondary Teachers Diploma (STD) in 1996. In the year 2000 I saw the need to beef up my qualification by doing an Advanced Certificate in Education through the Nelson Mandela University. In the year 2013 after a gap of more than ten years of

studying, I enrolled with the University of KwaZulu-Natal to pursue a two year Bachelor of Education Honours degree which I completed in record time.

4.4.4 My activism in the student politics at the college

Our group at the college was the first cohort of black Africans to be admitted. This College used to fall under the House of Delegates (the then parliament for Indians). During my first year of study, I was elected as the chairperson of the residential committee which then qualified me to sit in the Student Representative Council (SRC). As the chairperson of residential committee, I led the processes of negotiating the transformation of the student's residences. These negotiations graduated to the total transformation of the college to accommodate all races, not only those of Indian origin. This became a complete overhaul because it also included the type of food that the college was providing to the students. Serving in the SRC gave me a ticket to get elected into a KwaZulu-Natal Student Representative Council (KZN SRCs) in 1995. This structure was formed to combine the SRCs of all teacher colleges in KwaZulu-Natal. Its sole mandate was to fight for equal funding for all teacher colleges in the education system.

4.4.5 My experience as a novice teacher

After the completion of a teacher's diploma in the year 1996, I could not get employment in 1997 due to the fact that the department of education was in the process of addressing the overproduction of teachers through the process called redeployment and rationalisation. I stayed at home for a period of six months. Within this six months period, I re-activated my African National Congress membership and activism thereof. This led to my election as a secretary of the branch executive committee.

Given the employment difficulties in the teaching fraternity in the last quarter of 1997 I got employed as a casual worker at Pick n Pay stores in Durban. I worked in Pick n Pay until 1999 when I got a teaching post in a small secondary school which had an enrolment of plus or minus three hundred leaners. It had a staff establishment of only eleven teachers. The management was made up of two people, the principal and a head of department (HOD). Strangely, within a year of my employment, the principal who was a female appointed me as

an unpaid additional member of the school management team. This appointment was an internal arrangement which enjoyed the support of all members of the staff. I served in this position until I left the school in 2012.

4.4.6 My growth in a teacher union

When I got employed as a teacher in July 1999, I joined a very vibrant and militant teacher union. I was well aware about this teacher union long before I was employed. I associated myself with it when I was still at the college in 1995 when I was a member of the KZN SRCs. We had a cordial relationship with its regional and provincial leaders of that time. They were providing support and guidance to our structure given that all of us were not clued up about the operations of the Department of Education hence we were students. Moreover, I fell in love with it based on its association with my political home, the African National Congress (ANC).

In the year 2000 the staff unanimously elected me as a site-steward. Becoming a site-steward taught me that I had to remain exemplary to other teachers in terms of displaying acceptable behaviour and discipline in school. I made sure that I was at work around half past six every day without fail. This tendency became part of my system up until today. As a result, I have learned that early arrival at work sends a message to people under your leadership that being late at work is indefensible misconduct case. I held this position until my departure in 2012 to assume a school principal position in one of the primary schools around Inanda.

In the year 2013 when I was already a school principal, the branch leadership of the union declared that it was time for the members to discuss future branch executive committee members. My name came up in those discussions and I was then approached to stand for nominations when the branch elective meeting comes. Indeed, I accepted the nomination and got elected to the position of a branch deputy chairperson. I served in this position for two terms which ran from 2013 to 2018. In the year 2019 I was elected to a position of a branch chairperson. Being a branch chairperson qualifies me to become a regional executive committee member. This is the union leadership position I am currently holding.

4.4.7 Leading a school

I happened to be one of the markers in 2000 with only a year in the employ of the department of education. This was an unusual phenomenon because under normal circumstances it takes three years of experience for a novice teacher to become matric marker. A biology subject advisor encouraged me to apply after he was impressed by the level of my subject knowledge. Little did I know that two years later I was going to be given the responsibility of being a senior marker, the following year I became a deputy chief marker. After five years as a deputy chief marker I was promoted to a position of a chief marker. All these responsibilities increased the zeal of becoming a school principal hence in the year 2012 I applied for a principal position and I was successful.

The school in which I got appointed is a very small primary school. It had an enrolment of one hundred and twenty learners and a staff establishment of only five teachers. The size of this school made it possible for me to put more focus on my studies and union activities. After completing my honours degree in 2014, I felt that the size of the school was far lower than my capability thus I felt under-utilised and misplaced. The larger part of boredom was exacerbated by the fact that I had a secondary school background. Furthermore, there were very slim chances of growing the school because it is situated in a sparsely population area.

Given the circumstances I decided to apply for a bigger and challenging school in 2015. Fortunately, I got the post in one of big combined schools in Inanda. This school starts from grade R to grade twelve. When I arrived at this school it was sitting with the enrolment of one thousand three hundred and fifty learners and the staff establishment of forty five teachers who belonged to two competing teacher unions. Despite the challenges I anticipated in this school, I remained confident that I would succeed in leading a school because I felt I was like this bag *(figure 5),* full of knowledge and enthusiasm.

Figure 3: Thulasizwe's Artefact

The state of the school was not in order. The poor learning and teaching culture was glaring to everyone within and outside the school. I had to keep my hands dirty and allow myself to become an unpopular element for the sake of representing the Head of Department as expected of a school principal. I introduced the new systems and procedures to control the issues of absenteeism, late coming, lawlessness and instability. The instability was as a result

of lack of authority and lack of compliance thereof. The school had no principal for the past six year. In a space of five years (between 2009 and 2014) teachers had been able to chase away four principals through protest action. Signals were glaring in the early days of my arrival that plans were in place to chase me away too.

In dealing with the cases of misdemeanour among the staff I openly disempowered the staff members to be highly unionised and neglect their core duty of teaching. This led to the decline of vibrancy and unhealthy contestation of power between the two teacher unions. Then teachers began to focus to teaching and learning. It helped to make them understand that before teachers become active union members they are employed as teachers and are expected to serve their master, the employer by teaching hard in order to benefit the learners.

4.4.8 Leading in a bigger school

When I moved from a smaller school to a big combined school I was keen to contribute towards the nation building through effective school leadership and emancipation of teachers from exploitation. My mission was to lead the school with honestly and diligence without compromising my duties as a union executive chairperson. Given the load of work attached to leading a school, I decided to pay more attention to my professional duties rather that the union matters during school hours. I carefully set time to deal with union matters without compromising my school management duties. This assisted me to put more focus on the maintenance of my matric pass rate record which I delivered in the first year of my arrival in 2015.

Indeed, my proper time management became evident when I earned respect even from those teachers who affiliated to the rival teacher union. This cemented unity among the staff members. The teachers belonging to the other union used to be sceptical when I gave them an instruction and they would sometimes show some signs of hostility against me. This enabled me to provide proper management and supervision that would keep the staff united around one vision. Further, this lessened the level of scrutiny by union members regarding my comradeship role. Members of the union would demand that you apply comradeship even on matters where comradeship does not belong. They expect favours and leniency from you simple because you owe them their votes. This becomes a hindrance in turning things around in school.

Applying comradeship was not an option because my personal vision was to unite school and maintain the new working culture I had brought into the school. This worked in my favour because I eventually got unconditional support from both union internal structures. As a result, I continued to give political advice to the site-stewards of both unions. Both unions' internal leadership ended up playing a role of being a SMT support structure. I take them into confidence on any matter before it is taken to the whole school community. They do the same hence they brief me first before they take any union decision to their members. They also update me about any new chamber resolutions that might have not been brought to our attention by the department.

I am aware though that some few members of the staff are against with this kind of working relationship because they regard this as the suppression of unionism within the school. Contrary to that view, I personally regard this as the fundamental base of oneness and harmony that exist within the school. All decisions made within the school are a product of thorough consultation process. This cements trust and respect we earn from our clients. It humbles me to hear the department officials acknowledge that ever since my arrival in that school stability became the order of the day apart from the increase of the matric results.

4.4.9 The best practises I inherited from a teacher union

One critical aspect I inherited from the union is that of influencing the followers to act as a collective. Collectivism has become part of the health of our school as an organisation. To put this aspect into practice I introduced a structure called the Stakeholders Forum. This structure is made up of the SMT members, site-stewards of teacher unions, SGB representatives, the chairperson of the learner representative council and two elected post level one teachers. I am the chairperson of all its meetings. The function of this forum is to discuss critical school issues and to recommend for the adoption of decisions by the relevant school structures. This structure meets once a term.

The union taught me that without the support of all stakeholders nothing could be put into action in the organisation. I worked hard to garner the support of the total membership of the school community including the department officials. The union as a social partner also gives me the moral support in all programmes I spearhead to transform the school. Leading in the teacher union increased my people management skills. I am not sure whether one would have

survived even a single day in my current school without people management skills. We may differ with the teachers at times but they regard me as their reservoir of knowledge especially when it comes to administrative and labour matters. That is one of the reasons why I ensure that I keep them abreast with the information. The union taught me that people you are leading would regard you highly if you capacitate and develop them on matters of their interest. I capacitate them on all pieces of legislation including the consequences resulting from misconduct cases.

4.4.10 My achievements as a school principal

When I look at the academic performance of the school I get very happy and proud at the same time. When I joined the school in 2015, I discovered that the matric pass rate in 2014 was below forty percent. In 2015 the matric pass rate improved to seventy four percent. After that it has been ranging between seventy and ninety five percent. The certificates hanging in my office speak volumes to me. They reflect to me that they could have not been in that office without my commanding skills gained from leading a teacher union. When I enter my office and look at them, they tell me that of course I am a good manager and a good leader.

Due to the good academic performance of my school, the Department of Education gave me an added task on my plate. In 2018 the Department entrusted me with the task of being a care taker principal of one of the underperforming secondary school within the circuit. As a result, I spend fifty percent of my time managing my school and another fifty percent managing that school. The matric results of that school improved from below thirty percent in 2018 to seventy two percent in 2019. Leading these two giant schools is the reason I walk tall. I can proudly say that all is due to the leadership skills I gained during the time I was a leader in the teacher union.

My conclusion is that leading in a teacher union prepares one to be the best future school principal. I am basing this on my observation that schools headed by principals who are teacher union activists or leaders are better led than schools that are led by principals who have never been active in the teacher unions.

Admin an integral part of my work   *A school is as good as its leader*
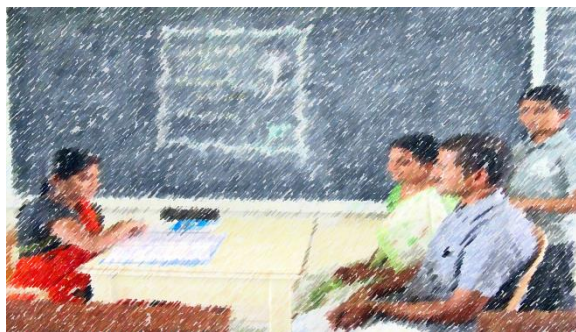
Providing leadership on learner matters in all situations
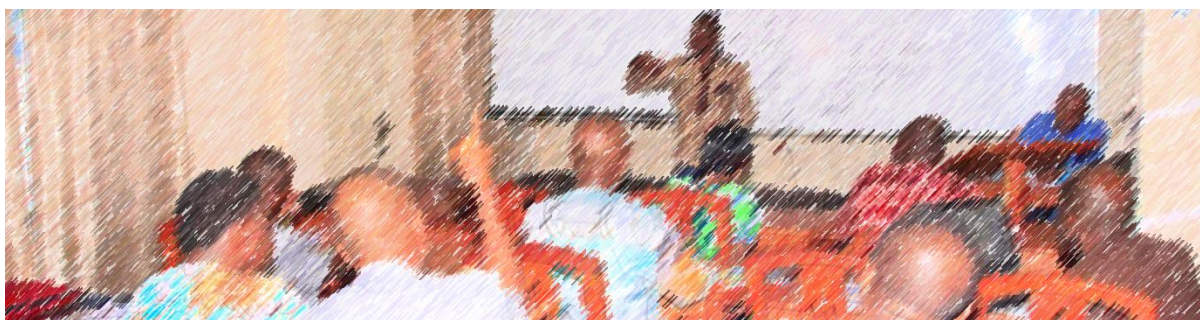
Applying democratic principles in running staff meetings

Leading from the from the front in the fight for education workers' rights

4.5 Conclusion

In this chapter I presented the first level of analysis in respect of the lived experiences of three school principals who are also serving as teacher union executive committee members. This stage of analysis is called narrative analysis. In this process their personal and professional experiences are put to light. The plot system was used to put their narratives in a chronological order. In the next chapter I present the analysis of narratives which is a second level of analysis. This refers to the themes that emerged from the re-storied narratives of the participants that are presented.

CHAPTER FIVE

ANALYSIS OF NARRATIVES

5.1 Introduction

The previous chapter presented the re-storied narratives of three school principals who are also serving as trade union executive committee members, namely, Dumsani Mdlalose, Mandlenkosi Msibi and Thulasizwe Goba. Their re-storied narratives helped me to understand their unique lived experiences in leading schools as well as leading in the teacher union. This chapter presents the analysis of narratives which is the second level of analysis. Analysis of narratives assisted me to deconstruct the narratives of these school principals with the aim of identifying themes that respond to the research puzzles. To this end, six themes were identified, namely, a school principal first before becoming a union leader, trade union leaders as political activists, drawing from union developed traits in performing principals' duties, questioning of principals' union credentials and principals' responses to transcend this, time management an enabler and banking on a strong collaboration within school management teams. These themes are presented below according to the research puzzles they answer.

5.2 The role identities principals construct of themselves as school principals and also as trade unions leaders

In chapter four, the re-storied narratives of Dumsani, Mandlenkosi and Thulasizwe are comprehensively presented to explain how they construct of themselves as school principals and also as trade union leaders. Hereunder I deconstruct their narratives to present key identities emerging from the narratives. These identities are**:** school principals first before becoming trade union leaders and trade union leaders as political activists.

5.2.1 School principals first before becoming trade union leaders

School principals are employers in the education sector and are direct representatives of the Head of Department. In terms of Employment of Educators Act No. 76 of 1998 their core

duty is to provide leadership and strategic direction to all employees at school level. They are also expected to lead the process of implementing policies as well as the decisions of the Department of Education to set a good tone for the school (Fullan, 2007). Although the participating principals hold prominent leadership roles in a trade union, they seem to prioritise the principalship role; for these principals principalship role comes first and union leadership role comes second.

In line with the above notion Mandlenkosi in his assertion notes that he is a direct representative of the Head of the Department in his school. He maintains that irrespective of his lack of management experience when he took up the principalship position. He had a responsibility to influence his supervisees to adhere to all education imperatives. This is what the employer expects of all her officials.

Mandlenkosi explains:

> *"When I am at work, I fully and honestly represent the Head of Department. I remain a professional implementer and protector of the decisions of the employer, the department of education. ...My union activities do not interfere with my principalship duties. My position as a school principal comes first in my list of priorities. I believe in the view that I lead in the union because I am employed as a teacher. ...Through my influential skills acquired from leading in the union, I succeeded to instil the spirit of oneness and professionalism among the members of my staff. I inspire them to implement departments' non-negotiables which we call revolutionary duties or revolutionary tasks in the trade union. Teachers under my supervision understand that when they are at work they are expected to teach an African child without any reservations".*

Dumisani also sees himself as a principal first and he ensures that the employer's expectations are not compromised. He explains:

> *"To minimise chances of clashes between my two roles I ensure that my responsibility of being the representative of the employer does not get compromised. In doing so, I make it a point that the policies and decisions of the department get implemented without exploitation of teachers".*

Thulasizwe's priority for the principalship role is prevalent in the manner in which he reacted to a poor teaching and learning culture in his school. He explicates:

"The state of the school was not in order. The poor learning and teaching culture was glaring to everyone. I had to keep my hands dirty and allow myself to become an unpopular element for the sake of correctly and accurately representing the Head of Department as expected of a school principal. I introduced new systems and procedures to control the issues of absenteeism, late coming, lawlessness and instability".

Given the above extracts it is clear that school principals who are also serving as teacher union leaders regard themselves as representatives of the employer first and second as union leaders. Data indicates that Thulasizwe, Dumsani and Mandlenkosi prioritise their role of representing the Head of Department rather than the teacher union in their schools. This is in line with the directives enshrined in the Education Laws Amendment Act No.31 of 2007. The school principals are directed by the act to represent the Head of Department in schools. The notion of becoming unpopular among the union members in their schools does not deter them from representing the employer. Data indicates that this keeps their schools effective and moving. They ensure that the culture of learning and teaching remains paramount as opposed to the union activities. They only give priority to union activities outside the school premises. In this regard, the participants portray that they possess multiple identities influenced by the organisations they are involved in, namely, the teaching profession and teacher unions (Trepte, 2004).

The study findings point out that the participants understand that apart from their duties of defending teachers as employees against the employer, they have responsibility to keep their schools effective and functional. In that light, they show good leadership. This is in line with the notion that the functionality of schools rests upon good leadership (Heystek, 2015; Moletsane, Prinsloo & Ready, 2015). Therefore, this study reveals that the participating principals remain loyal to their principalship duties.

5.2.2 Trade union leaders as political activists

All participants in this study have a common political background. They all began their political activities, including holding leadership roles in their young age. They began in the student formations during their time at a secondary school level and tertiary level

respectively. Interestingly, they are all currently leading in the same congress movement which makes them to possess a similar political background and ideology.

Mandlenkosi began his activism at a secondary school level when he was doing matric. He served in the student representative council. When he was in the university he actively participated in the student politics. Subsequently, he was given a leadership role in the mainstream politics. Mandlenkosi expounds:

> *"In 1999, I was recruited to join African National Congress Youth League and became an active member and a leader of this political organisation of the young people. Owing to this, in the year 2000 I was elected into a leadership role as a BEC secretary. I served as a secretary from the year 2000 to 2006. ...In 2004, I became instrumental in the formation of the branch of South African Young Communist League. Having noticed my political growth, some ANC leaders informed me that I was ready to lead at the level of the branch executive committee of the mother body. As a result, in 2007 I was elected into the branch executive committee of the mother body, not only as a member but as a secretary. ...By virtue of being an ANC branch secretary I was given a seat in the branch executive committee of the SACP. I have been in the leadership of the ANC since then, I am currently serving as a BEC deputy chairperson in our ward. I am also serving in the top ten in one of the ANC zones (sub-region) that consist of twelve branches".*

In the same breath, Dumsani Mdlalose has a rich political history. He is a former United Democratic Front activist. He led in the youth formation associated with UDF called South African Youth Congress (SAYCO) during his youth age. Being a political activist has exposed Dumsani to many treats, but he did not quit as he currently serves as a chairperson of one of the ANC's sub-regions.

Dumsani explains:

> *"My political activism dates back when I was doing standard nine (grade eleven). At this stage I was already a political activist affiliated to UDF. This caused me to run away from Machobeni and lived in Ntuzuma Township when I was doing matric. ...Therefore, by virtue of being a young influential and vibrant activist my family house was petrol bombed. ...This attack made me very popular among young political activists. In 1991 I was elected to a chairpersonship position of South African Youth*

Congress (SAYCO). ...In the same year (2009) I was also elected as an ANC branch treasurer. This meant the re-opening of another chapter of my leadership experience. I led since then to date."

Thulasizwe is also a political activist in his own right. His activism dates back during his time as a student at a secondary school level. His re-storied narratives explicitly point out that he possesses rich political background.

Thulasizwe expounds:

"When I was doing standard nine, I became one of the ring leaders of protest actions that led to the formation of student movement that fought against the payment of school fees and the wearing of school uniform. ... This was a time of violent political climate in the country and I was already politically active. ...When I was doing matric I met many comrades who ran away from their areas due to their political activism and violence. ... After the completion of a teacher's diploma in the year 1996, I could not get employment in 1997 due to the fact that the Department of Education was in the process of addressing the overproduction of teachers through the process of redeployment and rationalisation. I stayed at home for a period of six months. Within this six months period, I re-activated my African National Congress membership and revived my activism thereof. This led to my election as a secretary of the branch executive committee".

The above extracts indicate that there is correlation between trade unionism, politics and good leadership. All three participants have a rich political background. This also shows that their political activism influenced their recruitment into trade union leadership. This affirms the view that among other things, teacher unions were established in South Africa to deal with political matters (Burrows, 1986; Moll, 1989; Maile, 1999). Therefore, this study reveals that trade unionism and politics can never be divorced as long as the union leaders are recruited based on their political activism and ideology.

Drawing from social identity theory, the participants of this study were shaped by the political formations they affiliated to when they were growing up (Tajfel & Turner, 1979). These political formations serve as an in-group influence that shaped their leadership competencies (Tajfel, 1981). The same political background helped the participants to enforce transformational agenda with confidence and pride in their schools. Therefore, this

study reveals that political upbringing played critical role in the leadership competencies and qualities of participating school principals. This resonates with Blose's (2019) sentiment that people develop a self-concept or a particular understanding of oneself from different contexts in which they grew, lived and operated.

5.3 The influence of serving in a teacher union executive committee on principals' leadership practices

This section addresses the second research puzzle, which sought to establish the influence of serving in a union executive committee on the leadership practices of principals. In this segment two themes emerged, namely, drawing from union developed traits in performing principals' duties and questioning of principals' union credentials and principals' responses to transcend this.

5.3.1 Drawing from union developed traits in performing principals' duties

Serving in the union provided participants with some traits that seem to have assisted them in performing their principalship duties. Their re-storied narratives indicate that they are able to perform in their schools because of the traits they inherited from leading in a teacher union.

Mandlenkosi explains that although he had no experience to lead a school, the union had provided him with traits and expertise that assisted him to lead a school.

He explicates:

> "I can confirm that teacher union background assisted me hugely when I became a school principal given that I had no management experience. When I became a principal I had a clear understanding of what was expected of me as a visionary and progressive union leader. I knew exactly how to influence people under my supervision. I had learned this from leading in the teacher union. ...The critical attributes, namely, effective communication, transparency, openness and proper consultation, inherited from leading in the union serve as the backbone of my school. These also help me to keep the school community united around one vision and to increase a sense of trust between the staff members and me. ...I have learnt that

teachers are essential workers in their own right. ... Leading in the teacher union has taught me that everyone in the meeting should be made to participate actively. ...Correct meeting procedures form an integral part of the union non-negotiables. This helps to ensure that every decision taken is owned by every single member of the organisation".

Again Dumsani alluded to his own attributes he inherited from leading in a teacher union.

He explains:

"Teachers enjoy serving under a principal who is a leader in a union because they know that such a principal manages programmes rather than individuals. ...Union leaders like I do, empower, capacitate, defend and protect teachers from any form of abuse and exploitation. ...I apply democratic principles as espoused by the union and in the process I ensure that they do not form basis for chaos and anarchy in the school. ...Decision making is a management function; however, as I was taught in the union, I conduct proper consultation before I make a decision. This helps to guarantee the involvement of everyone in the organisation. ... Most of the values I possess as a school principal are an inheritance from the teacher union. These include open communication, transparency and honesty. These are some of the traits that strengthen my relationship with the parents and the school community at large".

Thulasizwe also views the traits developed from leading in the teacher union as the corner stone that shaped his principalship practice. He describes these traits as the best attributes that have permanent impact in his principalship career.

Thulasizwe explains:

"One critical aspect I inherited from the union is that of influencing the followers to act as a collective. ...The union taught me that without the support of all stakeholders nothing could be put into action in the organisation. ...Leading in the teacher union increased my people management skills. ...I may differ with my teachers at times but they regard me as a reservoir of knowledge especially when it comes to administrative and labour matters. ...The union taught me that people you are leading would regard you highly if you capacitate and develop them on matters of their interest".

From the above extracts, it is clear that leading in a teacher union plays a role in preparing members to become successful school leaders. The forgoing is informed by the participants' assertion that the traits they inherited from leading in a teacher union positively influenced their leadership practices in schools. This study teaches us that school principals who hold other leadership responsibilities outside their schools inherit good traits that are useful to turn schools into effective learning organisations. Therefore, based on the findings, teacher unions provided the participants with traits that were needed to sharpen their leadership skills to lead schools. This affirms the view that teacher unions conduct fruitful developmental programmes (Dlamini, Smit & loock, 2014). This strengthens the notion that well groomed school principals equip their supervisees with innovative skills to become in charge of their own pedagogical skills development (Bascia, 2000).

The inherent leadership qualities portrayed by the participants in their schools resulting from their union inherited traits affirm the view that social groups have a strong influence in shaping the characteristics of its members (Trepte, 2004). Therefore, from the data it is undisputable that teacher unions as social groups shape the characteristics of its leaders (Trepte, 2004). This is reflective in the positive change the participants effected in their schools. This study reveals that school principals who are also union executive members positively utilise their union inherited traits to perform their principalship duties especially with regards to three critical and fundamental functions of a school principal, namely, managing and controlling resources, leading in driving school vision and administering the day to day functioning of the school (Kowalski, 2010).

5.3.2 Questioning of principals' union credentials and principals' responses to transcend this

The participating principals utilised their union inherited influence to instil positive change in their schools when they ascended to their pricipalship positions. Data indicates that they soldered on despite criticism from fellow union members within their staffs. Under the circumstances they defeated all attacks that sought to deter them from transforming schools. They did not bend even when these teachers questioned their political background and their union credentials. Their re-storied narratives indicate that when they are at work (school) they diligently focus on instilling positive changes as part of their professional duties. Their comradeship duties kick in only when they are dealing with union matters outside the school premises. All three participating principals reflect abilities to separate professional duties

from political duties irrespective of scrutiny directed to them by the fellow union members within their schools.

Mandlenkosi had the following to say in respect to scrutiny by some members of his staff:

> "...this is not as smooth as I wish because some influential young union activists among the staff members attack me at times. They say my posture towards the department's non-negotiables does not reflect my leadership position in the union. ...they even question my political background to advance their argument against me".

Again, Dumsani shares a similar sentiment with Mandlenkosi. He had the following to say:

> "In the process of correcting all misdemeanours I became unpopular to most staff members, some questioned my union credentials as a union leader. They described me as an exploitative union leader".

Again, Thulasizwe did not get a smooth sailing due to the attacks during his initial stages of turning his school around. He experienced similar scrutiny experienced by the other two participants, Mandlenkosi and Dumsani.

He explains:

> "The teachers lacked sense of responsibility and commitment. I had to keep my hands dirty and allow myself to become an unpopular element for the sake of bringing back the culture of learning and teaching. ...My commitment in dealing with the cases of misdemeanour led to the questioning of my political upbringing including my union credentials by most of the staff members".

From the above extracts, it is clear that principals who are also union leaders do get scrutinised by their supervisees in their endeavour to bring positive change in their schools. The re-storied narratives of the participants indicate that their commitments to bring positive change in their schools went through a rough patch from their subordinates; however they pulled through against the attacks owing to the influential skills they acquired from leading in the union. Interestingly, their subordinates hailed them as good leaders immediately after positive outcomes are realised and when their schools become effective learning organisations. The participants reflect leadership qualities that are explicitly explained by the proponents of relationship leadership theory (Cherry, 2012). Relationship leadership theory is a contemporary leadership theory which falls under leadership as a process perspective

(Avolio, Walumbwa & Weber, 2009). Literature on this theory focuses on the performance of the organisation rather than that of an individual (Smith et al., 2004). The foregoing resonates with the deeds of the participants in this study. They forge connection in order to influence their supervisees with an objective to achieve positive change in their schools regardless of negative posture of the supervisees. This is in line with the view that relationship leadership theory is built on the discourse that leadership is a process by which leadership forges connection and subsequently influences followers with an objective to achieve predetermined objectives (Amanchuku, Stanly & Ololube, 2015).

Data teaches us that more often than not, teachers in their capacity as trade union members believe in a transactional type of relationship towards school principals who are union members (Miller & Miller, 2001). They expect to gain favours from principals who are union leaders. In the absence of favours they then begin to be critical when these principals show loyalty to their professional duties. This study teaches us that principals who are leading in the union prefer to preserve the good image of their schools as organisations of learning and by extension, the Department of Education rather than pleasing their members. This is in line with the notion that teachers should preserve the good image and integrity of the Department of Education at all material times (Bush, 2007). The forgoing is shown in the manner in which the participants respond when their union credentials were questioned by their supervisees. They ignore their critics and moved on to fight against the misdemeanours and introduce programmes that bring about positive change in their schools. This is in line with the suggestion that the education of the children should remain free from politics and schools should be run professionally (Reeves, Forde, Morris & Turner, 2003).

5.4 Negotiating between two leadership roles

This section answers the third and final research puzzle of this study. Here I show how the participants negotiate between their two contesting leadership roles, namely, a school principal and a union executive leader. Hereunder, I present two emerging themes, namely, time management as an enabler and banking on a strong collaboration within school management teams.

5.4.1 *Time management as an enabler*

In an attempt to illuminate how school principals strike the balance between their two contesting leadership roles, the participants identified time management as an enabler. The re-storied narratives of all three participants, Mandlenkosi, Dumsani and Thulasizwe, indicate that proper time management enables them to ensure that schools as institutions of learning and teacher unions as organisations they lead, equally receive attention they deserve.

Mandlenkosi voices out how time management enables him to strike the balance between his two leadership roles. He had the following to say:

> *"The key for me to perform successfully my principal duties and my trade union duties is time management. ... I use agreed time offs to attend to teacher union activities. ... I dedicate much time in doing school administrative work in the afternoon after everyone has left. This makes it possible to do my managerial duties effectively and efficiently".*

In line with the foregoing assertions of Mandlenkosi, Dumsani pointed out the following:

> *"I effectively utilise all resources at my disposal including time.... In my view time is the most critical resource in respect to leadership as process or an activity. Unfortunately, time is a scares resource thus it needs to be used economically. I ensure that I plan my time effectively against the union programmes and school programmes. The intention is to ensure that no leadership responsibility gets neglected. ... I work an extra time to cover up my management duties and to buy up time that might have been lost owing to union activities".*

Thulasizwe shares similar sentiments that effective time usage is an important factor to strike the balance between his two leadership roles. He had the following to say:

> *"...When I moved from a smaller school to a bigger combined school I reorganised my time management plan in order to ensure that both my leadership responsibilities are well taken care of. This move was critical to ensure that I don't find myself neglecting one area of my leadership responsibilities.*

Drawing from the utterances of the participants it is clear that their ability to utilise time effectively enables them to navigate between their two leadership roles. This indicates that both organisations under their leadership equally receive their undivided attention. This is in

line with the view that effective utilisation of time yields good results (Claessens, van Eerde, Rutte & Roe, 2007). Time management is an integral part of a planning process (Blose & Naicker, 2018; Claessen et al., 2004). This affirms the statement made by Winston Churchill a former United Kingdom Prime Minister during the years between 1940 and 1945. Winston Churchill said "He who fails to plan plans to fail". Therefore, time management enables the participants to plan properly in order to keep their schools thriving including their union organisation. Osburn and Mumford (2006) stated that effective time management is proper planning and is a crucial aspect of creativity. As a result, to produce creative outcomes one needs to manage time properly (Glassman, 1986). Data indicates that the participants inherited time management skills from leading in a teacher union. Trepte (2006) describes this as the social group influence. Therefore, this study teaches us that principals who are also union executive leaders belong to an in-group type of a social group (Tajfel, 1981). This is based on the view that these school principals give credit to their teacher unions for their good attributes including time management. Based on the findings of this study, principals who are also trade union leaders utilise time properly to strike the balance between their two contesting leadership positions.

5.4.2 Banking on a strong collaboration within school management teams

After the dawn of democracy in 1994 the decision making powers were decentralised to schools (Bush et al., 2011). The issues of authority and accountability were placed in the hands of school principals and their supporting structures (SMTs). This increased the demands regarding unity among the members of the school management teams. Subsequently, the schools effectiveness demand undivided attention from school principals as leaders of school management teams. This study reveals that school principals who are also serving as teacher union leaders succeed in their leadership responsibilities owing to a strong collaboration within their school management teams. The narratives of all participants indicate that they are all banking on a strong collaboration within their school management teams to perform their leadership roles.

In expressing the nature of collaboration that exists within his SMT, Mandlenkosi had the following to say:

> "*I needed to forge cordial relationship with the entire SMT on my arrival. This helped me to instil the culture of collaboration within the school management team. ...If I happen to leave school to attend union matters the school continues to function smoothly due to the professional understanding and collaboration that exists within the school management team. I work with a highly committed and united school management team*".

A similar sentiment is shared by Dumsani who respectively indicated that his school flows like a well-oiled machine due to a strong collaboration that exists within his school management team.

Dumsani vented as follows:

> "*People fail to understand that managing a school needs a strong collaboration within the SMT. This makes it easy for me as a school principal to spearhead the implementation of school policies and regulations. ...Generally teachers respond positively to instructions in an institution where the SMT works collaboratively to provide leadership and direction*".

Congruent to the statements made by the other participants, Thulasizwe propounds:

> "*In dealing with the cases of misdemeanours of teachers, I began by winning over trust and support of the school management team. As a result all school management team members deactivated themselves from union activities. ...Subsequently, there is strong collaboration within the SMT which makes it easy to keep teaching and learning progressing as expected*".

The above extracts show how valuable the collaboration is within the school management team. Schools remain effective and functional if the school management teams willingly think work and act together irrespective of whether the school principals are present or are away for union activities (Senge et al., 2012). The participants of this study explicitly teach us that collaboration within the school management teams serves as an enabler for effectiveness in schools. Drawing from the relationship leadership theory, school principals as members of the SMT are placed at the apex position and have an obligation to motivate and inspire their school management teams in order to instil collaboration (Cherry, 2012). This is in line with the view that motivation and inspiration provided by leaders to their followers have power to influence them towards the realisation of the predetermined goals

(Wolinski, 2010). Therefore, unity within the SMT serves as the backbone for the leadership success of school principals. This resonates with the view that school principals have an obligation to unite the school community around one vision (McCrimmon, 2010). In this way, the school community will pull together toward ensuring that a school becomes effective. In addition, the participating school principals seem to exercise what Myende, Blose and Adebiyi (2021) view as open-participatory leadership which centres on the trust of multiple pearls of wisdom found in organizations.

5.5 Conclusion

This chapter presented the second level of analysis, namely, analysis of narratives. To this end, the chapter discussed the findings guided by three research puzzles, namely, the role identities principals construct of themselves as school principals and as trade union leaders, the influence of serving in the union executive committee on principals' leadership practices and the negotiating between two leadership roles. The next chapter marks the end of the study. It presents the summary of the study, its conclusions taken from the findings and the recommendations originating from the study. Finally, the implications of the study are presented.

CHAPTER SIX

CONCLUSIONS AND RECOMMENDATIONS

6.1 Introduction

The preceding chapter presented the findings of the study. The findings were presented to provide answers to the research puzzles. This final chapter concludes the study. In concluding the study, I bring to light four aspects, namely the summary of the study, conclusions derived from the study findings, the recommendations of the study and the implications of the study.

6.2 Summary of the study

Chapter one introduced the study and presented an orientation as well as the background. This included the background to the study, problem statement, rationale for the study and research puzzles. Further, this chapter presented the location for the study and also outline of chapters were presented.

Chapter two presented two sections: Literature review and theoretical framework. The literature review component provided the review of both local and international literature regarding the role of school principals and the role of union executive representatives in the education system. The theoretical component presents two theories that were used as lenses to understand the studied phenomenon. These theories are Social Identity Theory and Relationship Leadership Theory.

Chapter three discussed the research process and procedure; this includes the, research paradigm, research design utilised in the study, the narrative inquiry methodology that serves as a backbone for the study and the research methods. The research methods included data generation, sampling and analysis methods. In addition, the chapter presented trustworthiness and ethical issues applied in the study.

Chapter four presented the re-storied narratives of participants which are chronological accounts of their lived experiences. The re-storied narratives captured their early lives, upbringing, schooling career and their leadership roles, both as school principals and as leaders in teacher unions. The forgoing is the first level of analysis called narrative analysis.

Chapter five provided the second level of analysis called analysis of narratives. This chapter deconstructed the participants' re-storied narratives using paradigmatic processes. Subsequently, six themes emerged from the re-storied narratives; these themes were then presented in relation to the research puzzles.

6.3 Conclusions emanating from study findings

This section presents the conclusions which were drawn from the findings. These conclusions are in relation to each research puzzle. In order to remind the reader, the research puzzles as well as the summary of findings are restated hereunder:

6.3.1 Research puzzles

- What role identities do principals construct of themselves as school principals and also as trade union executive leaders?
- How does serving in a teacher union executive committee influence leadership practices of principals in schools?
- How do school principals serving as trade union members negotiate between the two contesting leadership roles?

6.3.2 Summary of findings

- The school principals who are serving as trade union leaders regard themselves as representatives of the employer first; for these principals, being leaders in a teacher union comes second.
- The findings of this inquiry show a correlation between trade unionism and good leadership. Given that some form of leadership is exercised in both roles, principals who serve as teacher union leaders appeared to exercise good leadership.
- Leading in the teacher union prepares school principals to become successful school leaders. Teacher unions came a source for leadership development for the participating principals. The participants were involved in teacher unions long before

their appointment to principalship. By the time they were appointed to principalship, they had some understanding of what is expected of them as school principals.

- School principals who are also teacher union leaders do get scrutinised by their supervisees in their schools in the process of bringing positive change in their schools.

- School principals who are also teacher union leaders succeed in leading schools owing to their ability to utilise time effectively to navigate between their two leadership roles. Time management was significant for the participating principals.

- Collaboration with School Management Team keeps the school effective and functional. Operating in two leadership roles open up opportunities for networking for the participating principals. As union leaders they know different office bearers in the department and other stakeholders outside the department. This enable them to forge helpful networking.

6.4 Conclusions

6.4.1 The role identities principals construct of themselves as school principals and also as trade union leaders.

The participants to this study were school principals who besides being principals are leaders in unions' executive committees. These leaders had their own constructions of themselves in the two roles. On one hand, they see themselves as direct representatives of the employer in schools and on the other hand they see themselves as political activists. In this enquiry there are two broad themes that emerged from the re-storied narratives of the participants, namely, school principals first before becoming trade union leaders, and as political activists.

Firstly, it was established that these principals prioritise their professional duties in their schools instead of teacher union matters. They choose to become unpopular to fellow union members within their schools instead of becoming darlings and compromise the culture of teaching and learning in their schools. Consequently, they see their schools as effective and moving. These principals ensure that their union activities do not interfere with the smooth functionality of schools. In this way, they show allegiance to their professional duties. Based on this finding, I can conclude that leading in the teacher union has strengthened the zeal and enthusiasm of the participating school principals to keep their schools effective and thriving.

Secondly, this inquiry established that principals who are also teacher union leaders possess rich political background. Their political activism manifested in their political upbringing and their current political leadership positions in the mainstream politics. This includes the fact that they were recruited to the union leadership positions based on their political backgrounds. Therefore, their leadership expertise is informed by their political experience. I therefore, draw a conclusion that principals who are also political activists appear to prioritise transformation of their schools.

6.4.2 The influence of serving in a union executive committee on principals' leadership practices.

The study further revealed that school principals who are union executive leaders possess leadership qualities acquired from leading in teacher unions. This inquiry established that, despite good qualities obtained from leading in the teacher union, in their endeavour to set the good tone in their schools, they had to deal with some attacks and scrutiny from fellow union members within their schools. In that light, two factors influencing their leadership practices were identified, namely, union developed traits and the questioning of their union credentials by their staff members. Firstly, it was found that the school principals who are also union executive leaders inherited good traits from leading in the union. These traits seem to assist these school principals in carrying out their principalship duties. Therefore, it suffices to conclude that union inherited traits sharpen the leadership skills of a school principal thereby influencing his / her school leadership practices.

Secondly, the findings of this study revealed that the union members within the staff establishments of the schools led by principals who serve as executive union leaders sometimes question their credentials in cases where they are not pleased with their leadership practices. Although the participating principals were not happy about the attitudes of some of the teachers, they did not succumb to the expectations of such teachers, instead they continued to exert their influence. In this way, they were able to transcend the scrutiny from the teachers.

6.4.3 Negotiating between two contesting leadership roles

This study brought to light two practices applied by the participating school principals to negotiate between their two contesting leadership roles, namely, time management and collaboration within the SMTs. Firstly, the participating principals gave appropriate attention to their two roles. For these principals, proper time management is one of the key abilities that enabled them to negotiate between their two leadership roles. In this way, they were able to strike the balance between their two leadership roles.

Secondly, the SMT is a critical structure in schools in the contemporary South Africa. The findings in this study have shown that the participants are banking on the collaboration of their SMTs to ensure that things do not fall apart in their schools when they are away to attend to union matters. The participants were found forging unity among the members of their SMTs. For these principals, this proved to work in terms of keeping their schools moving and thriving. Therefore, I conclude that principals who are also serving as union executive leaders can keep their schools moving if they build strong collaboration among their SMTs.

6.5 Recommendations

Drawing from the findings and conclusions provided above, I make the following recommendations to the Department of Education, school principals and teacher union.

6.5.1 Encourage school principals to became active teacher union members

This study revealed that school principals who are also teacher union executive leaders remain loyal to their professional duties. In that way they are principals first before they are union leaders. This tells us that they conduct themselves in line with the directives stipulated by the Department of Education in schools rather than entertaining the expectations of the union members within their schools. Further, the study revealed that these principals prefer to be regarded as betrayers of the struggle of the workers as long as their schools are effective and functional. Furthermore, it came to light that teacher unions equip principals with skills and qualities that are relevant to leading schools. Therefore, I recommend that the department of education should encourage school principals to become active teacher union members.

6.5.2 Principals as union activists

As indicated in the latter section, teacher unions provide its leaders with traits that help them in carrying out their principalship duties. This indicates that school principals who are teacher union activists have another avenue from which they draw leadership qualities and skills. Although teacher unions have been known for destruction, in this study we learnt that they are a learning platform. The participants of this study were found utilising their union inherited traits to keep their schools moving. Therefore, I recommend that school principals should not only become passive members in teacher unions but they should take active positions and become leaders in the structures.

6.5.3 Building capacity of union members

This study further revealed that school principals fight hard to instil positive change in their schools due to scrutiny they encounter from union affiliates within their schools. These union affiliates questioned the participants' union credentials and their political backgrounds with an aim to discredit and disarm them from performing their principalship duties. It is found that this originates from these teachers' narrow self-interests. They expect favours from the principals who are union executive leaders. It has been established that these teachers end up labelling the participants betrayers of the workers' struggle. Therefore, I recommend that the unions should capacitate their active members about the mandate of the union executive leaders who ascend to the principalship position.

6.6 Implications for further study

This was a small scale study that examined the lived experiences of three school principals who are also serving as teacher union executive leaders. All participating principals are leaders of the same teacher union and are located in the same education District in KwaZulu-Natal. Their lived experiences cannot be generalised to all principals who are also executive union leaders in the district or in South Africa. My aim of utilising narrative inquiry methodology was to bring to light the lived experiences of school principals who are also teacher union executive leaders. In light of different contexts and complexities that exist in South Africa, it is my considered view that there is a great need for further studies of a large

scale. There is dearth of literature written relating to the lived experiences of school principals who are also serving as teacher union executive leaders. Further studies will broaden our understanding regarding the lived experiences of these leaders in South Africa.

6.7 Conclusion

This study focused on the lived experiences of school principals who are also serving as teacher union executive leaders. Three research puzzles were utilised to generate data. Narrative inquiry methodology was adopted to determine the lived experiences of the participants. The participants were purposively selected. In the process of establishing the lived experiences of the participants, this study found two role identities that the participants construct of themselves, namely, school principals first before becoming teacher union leaders and trade union leaders as political activists. Additionally, the study brought to light two aspects that exert influence on principals' leadership practices, namely, union developed traits and questioning of principals' union credentials. Furthermore, the study pointed out two aspects that enable school principals to negotiate between the two leadership roles, namely, time management and collaboration within school management teams. Finally, this study revealed that teacher unions have positive influence in sharpening school principals' leadership skills.

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Data generation tool

Field texts (Data) were generated through three methods, namely, narrative interviews, collage inquiry and artifact inquiry. Four data generation sessions over two days were schedules with each participant. All sessions were conducted online using Zoom and WhatsApp.

DAY ONE

Session one: An unstructured interview on zoom was scheduled. Participants were requested to narrate stories of their early life experiences.

The following was expected to be included:

- Their upbringing
- Schooling career
- Life experiences

DAY TWO

Session two: Participants were asked to use old magazines and charts to develop collages. Once the collages were developed they were requested to take photos and send them via WhatsApp and also send a voice note explaining memories triggered by each picture in the collage.

Collage question:

- What it means to be a school principal and union executive member?

DAY THREE

Session three: Participants were requested to relate their stories of experience as school principals including as teacher union executive members.

Their narratives were expected to include the following:

o Experiences of leading schools

- o Experiences of leading in a union
- o Relationship / clashes between the roles

Session four: Each participant was asked to identify one object or artifact that triggers some memories of experiences in the school principalship role as well teacher union executive membership role. Participants were then asked to take pictures of this object and send them via WhatsApp together with voice notes.

Question:

Would you identify an object that triggers some memories about your two leadership roles?

UNIVERSITY OF ™
KWAZULU-NATAL
INYUVESI
YAKWAZULU-NATALI

01 October 2020

Mr Hazel Ndumiso Hlongwa (219094296)
School Of Education
Edgewood Campus

Dear Mr Hlongwa,

Protocol reference number: HSSREC/00001903/2020
Project title: Negotiating between two competing leadership roles: Narratives of principals serving as trade union executive members.
Degree: Masters

Approval Notification – Expedited Application

This letter serves to notify you that your application received on 11 August 2020 in connection with the above, was reviewed by the Humanities and Social Sciences Research Ethics Committee (HSSREC) and the protocol has been granted **FULL APPROVAL** on the following condition:

Any alteration/s to the approved research protocol i.e. Questionnaire/Interview Schedule, Informed Consent Form, Title of the Project, Location of the Study, Research Approach and Methods must be reviewed and approved through the amendment/modification prior to its implementation. In case you have further queries, please quote the above reference number. PLEASE NOTE: Research data should be securely stored in the discipline/department for a period of 5 years.

This approval is valid until 01 October 2021.
To ensure uninterrupted approval of this study beyond the approval expiry date, a progress report must be submitted to the Research Office on the appropriate form 2 - 3 months before the expiry date. A close-out report to be submitted when study is finished.

All research conducted during the COVID-19 period must adhere to the national and UKZN guidelines.

HSSREC is registered with the South African National Research Ethics Council (REC-040414-040).

Yours sincerely,

Professor Urmilla Bob
(University Dean of Research)

/dd

Humanities and Social Sciences Research Ethics Committee
Postal Address: Private Bag X54001, Durban, 4000, South Africa
Telephone: +27 (0)31 260 8350/4557/3587 **Email:** hssrec@ukzn.ac.za **Website:** http://research.ukzn.ac.za/Research-Ethics

Founding Campuses: ▪ Edgewood ▪ Howard College ▪ Medical School ▪ Pietermaritzburg ▪ Westville

INSPIRING GREATNESS

Ethical clearance letter:

9 Swallow Place
Sarnia
Pinetown
3610

Dear Sir

RE: REQUEST FOR PERMISSIOIN TO CONDUCT RESEARCH AT YOUR SCHOOL

I am Ndumiso Hlongwa and I am conducting a research as a requirement of the University of KwaZulu-Natal towards a Masters Degree. The title of the research study is "Negotiating between two contesting leadership roles: Narratives of principals serving as trade union executive members".

I would like to use your school as one of the research site, and this letter intends to request your permission. The focus of the study is on the principals who are trade union executive members; therefore I would like to request Mr B.M Dlamini to participate in the study. Should permission be granted, the interviews with him will be scheduled for dates and times that are convenient to him. Care will be taken that no disruption is caused during such interviews. Please also note that the participation in this study is voluntary, and the participant has the right to withdraw from the study at any time without any negative consequence. In addition, you are assured that details of the school and the participant will be kept confidential, and your identity will never be disclosed to anyone.

For more information and questions about the study, you may contact the researcher or the research supervisor on the following details:

- Name of the researcher: Ndumiso Hlongwa
- Email: ndumisoh29@gmail.com
- Cell: 083 744 2244
- Supervisor: Dr S.B. Blose
- Email: Bloses@ukzn.ac.za
- Tel No: 031 260 1870

You may also contact the Research Office through:
P. Mohun
HSSREC Research Office,
Tel No: 031 260 4557
Email: mohunmp@ukzn.ac.za

Thanking you in advance

Mr H.N. Hlongwa

KWAZULU-NATAL PROVINCE
EDUCATION
REPUBLIC OF SOUTH AFRICA

OFFICE OF THE HEAD OF DEPARTMENT

Private Bag X9137, PIETERMARITZBURG, 3200
Anton Lembede Building, 247 Burger Street, Pietermaritzburg, 3201
Tel: 033 3921062 / 033-3921051

Email: Phindile.duma@kzndoe.gov.za
Buyi.ntuli@kzndoe.gov.za

Enquiries: Phindile Duma/Buyi Ntuli

Ref.:2/4/8/7004

Mr Ndumiso Hlongwa
9 Swallow Place
PINETOWN
3610

Dear Mr Hlongwa

PERMISSION TO CONDUCT RESEARCH IN THE KZN DoE INSTITUTIONS

Your application to conduct research entitled: **"NEGOTIATING BETWEEN TWO COMPETING LEADERSHIP ROLES: NARRATIVES OF PRINCIPALS SERVING AS TRADE UNION EXECUTIVE MEMBERS:**, in the KwaZulu-Natal Department of Education Institutions has been approved. The conditions of the approval are as follows:

1. The researcher will make all the arrangements concerning the research and interviews.
2. The researcher must ensure that Educator and learning programmes are not interrupted.
3. Interviews are not conducted during the time of writing examinations in schools.
4. Learners, Educators, Schools and Institutions are not identifiable in any way from the results of the research.
5. A copy of this letter is submitted to District Managers, Principals and Heads of Institutions where the Intended research and interviews are to be conducted.
6. The period of investigation is limited to the period from 16 September 2020 to 10 March 2023.
7. Your research and interviews will be limited to the schools you have proposed and approved by the Head of Department. Please note that Principals, Educators, Departmental Officials and Learners are under no obligation to participate or assist you in your investigation.
8. Should you wish to extend the period of your survey at the school(s), please contact Miss Phindile Duma/Mrs Buyi Ntuli at the contact numbers above.
9. Upon completion of the research, a brief summary of the findings, recommendations or a full report/dissertation/thesis must be submitted to the research office of the Department. Please address it to The Office of the HOD, Private Bag X9137, Pietermaritzburg, 3200.
10. Please note that your research and interviews will be limited to schools and institutions in KwaZulu-Natal Department of Education.

Dr. EV Nzama
Head of Department: Education
Date: 16 September 2020

GROWING KWAZULU-NATAL TOGETHER

FULL SERVICE SCHOOL
Department of Education

Township   P.O.
4359   REDHILL
                  4071

Dear Ndumiso Hlongwa

RE: PERMISSION TO CONDUCT RESEARCH AT   **FULL SERVICE SCHOOL**

Your letter titled "Request to conduct research at your school" has reference. Please be informed that you are granted a permission to conduct your research at the above mentioned school.

Yours sincerely

KZN DEPARTMENT OF EDUCATION
FULL SERVICE SCHOOL

P.O. BOX
REDHILL, 4071

PROVINCE OF KWAZULU-NATAL
DEPARTMENT OF EDUCATION

PRIMARY SCHOOL

Address:	Private Bag	TelFax:
Ikheli:	Inanda	Cel:
Adres:	4310	
Enquiries:		
Imibuzo:		
Vrae:		

Dear Ndumiso

RE- PERMISSION TO CONDUCT RESEARCHE AT _____ PRIMARY SCHOOL

Your letter titled " Request to conduct Research at _____ Primary School" has reference. Please be informed that you are granted a permission to conduct your research at the above mentioned school.

Your sincerely

████████████
_____ / Principal
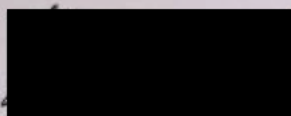
**KWAZULU NATAL
DEPARTMENT OF BASIC EDUCATION**

.com

Dear Sir / Madam

I hereby give permission to Ndumiso Hlongwa to do a study on the narratives of principals who are also serving as Teacher Union Leaders.

We hope he will benefit and gain experience and expertise in meeting the requirements towards achieving his Masters Degree.

Yours Faithfully

███████████████

KZN DEPT OF EDUCATION
PRIMARY SCHOOL

P.O. BOX   INANDA, 4310
SIGN:...

Principal

9 Swallow Place
Sarnia
Pinetown
3610
15 September 2020

Dear Sir

RE: REQUEST FOR PARTICIPATION IN THE RESEARCH

My name is Mr. Ndumiso Hlongwa. I am conducting a research as a requirement of the University of KwaZulu-Natal towards a Masters Degree in Leadership, Management and Policy. The title of the research is "Negotiating between two competing leadership roles: Narratives of principals serving as trade union executive members". The objectives of the study are:

- To examine the personal and professional identities of the school principals serving as trade union executive members.
- To explore how do principals serving as trade union executive members negotiate between the contesting leadership roles
- To determine how does serving in a union executive committee influence leadership practices of a principal in a school.

The study will focus on exploring how do you negotiate between your two leadership roles, namely, a union leader and a school manager. This letter, therefore, intends to elucidate the purpose of the study and request your participation in the study.

Please no that:

- Your confidentiality is guaranteed as your inputs will not be attributed to you in person, but will be reported only as a population member opinion.
- Due to the current COVID-19 pandemic, interviews will take place online using WhatsApp and Zoom.
- The interviews may last for about one hour and may be split into two parts depending on your preference.
- Any information given by you cannot be used against you, and the collected data will be used for purposes of this research only.
- Data will be stored in secure storage and destroyed after five years.
- You have a choice to participate, not participate or stop participating in the research. You will not be penalised for taking such an action.
- Your involvement is purely for academic purposes only, and there are no financial benefits involved.
- If you are willing to be interviewed, please indicate (by ticking as applicable) whether or not you are willing to allow the interview to be recorded by the following equipment

	WILLING	NOT WILLING
Audio equipment	✓	

I can be contacted at:

- Cell: 083 744 2244

My supervisor is Dr. S.B. Blose who is located at the School of Education, at the University of KwaZulu-Natal. Dr Blose can be contacted at:
- Email: Bloses@ukzn.ac.za
- Phone: 031 260 1870

I hope this letter will find your positive consideration, thanking you in advance.

Yours Sincerely
Ndumiso Hlongwa

PLEASE COMPLETE THE FOLLOWING SECTION FOR CONSENT OF PARTICIPATION:

I ------------------------- ------------------------------hereby confirm that I understand the nature and purpose of the study entitled: Negotiating between two contesting leadership roles: Narratives of principals serving as trade union executive members. I agree to participate in the study and the online interviews. I am also fully aware that I have the right to withdraw from the study at any point should I wish to do so, without any negative or undesirable consequence. I am also aware that there are neither any foreseeable direct benefit no direct risks associated with my participation in this study. I therefore understand the contents of this letter fully and I do GIVE CONSENT for the interviews to be digitally recorded.

2
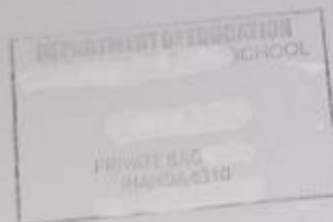
Mr. N. Hlongwa

ORIGINALITY REPORT

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PRIMARY SOURCES

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Turn-it-in Certificate:

25 Maple Crescent Circle Park KLOOF 3610	Phone 031 – 7075912 0823757722 Fax 031 - 7110458 E-mail: dr1govender@telkomsa.net sathsgovender4@gmail.com

Dr Saths Govender

1 MARCH 2021

TO WHOM IT MAY CONCERN

LANGUAGE CLEARANCE CERTIFICATE

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

NEGOTIATING BETWEEN TWO CONTESTING LEADERSHIP ROLES: NARRATIVES OF PRINCIPALS SERVING AS TRADE UNION EXECUTIVE MEMBERS

by H. N. HLONGWA, student no.219094296.

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

Yours faithfully

DR S. GOVENDER
B Paed. (Arts), B.A. (Hons), B Ed.
Cambridge Certificate for English Medium Teachers
MPA, D Admin.