

Full Length Research Paper

An evaluation of the present status of the certificate in school business management

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By almost any measure, most South African public schools, and especially schools in the Western Cape, have under-performed academically. For a number of years, there has existed a wide degree of consensus among education stakeholders, and particularly in government, that the problems in our schools extend beyond mere academic under-achievement. Principals need to be occupied with the tasks of managing and leading teaching and learning, that is, instruction leadership, and not managing routine administrative matters only. In recognising the potential of school administrative personnel to provide relief and support for the administrative role of principals, the Western Cape Government initiated a training course in July, 2008 for school business administrators. The course was modelled on a very successful training course developed in the United Kingdom.

Key words: School bursars, school evaluation, school business management, school administration.

INTRODUCTION

In the most recently published Global Competitiveness Index 2010/2011 of the World Economic Forum (which compared the performance of 139 economies in 2010), South African primary schools were ranked 125th for their 'quality of the education system' (Schwab, 2010). It was not coincidental that almost 40% of the 610 000 learners who wrote Matric in 2009 failed. In order to improve the academic performance of schools, they need to become efficient environments for effective learning and teaching. However, many commentators (Bloch, 2009; Gallie, 2006, as cited in De Clercq, 2008) argue that most educators work in non-functioning and low-functioning schools.

According to Taylor (2006), such schools comprise around 80% of the schooling system. Ineffective administration inevitably forces teachers, school management teams and principals (head teachers) to be more involved in administration, and consequently, less involved in teaching. Thus, the more dysfunctional a school's management, the more negative becomes the environment for effective learning and teaching (Steyn, 2003).

The South African national Department of Basic Education (DBE) has set "improving the quality of teaching and learning" as the primary goal of its 2010 to 2013 strategic plans. It is manifestly obvious that, in order to achieve this aim, the quality of administration and governance of schools at most schools in South Africa, has to drastically improve as well. From that perspective, the Certificate in School Business Administration (CSBA) course is a timely and strategically crucial intervention.

Research problems

This research intends to achieve its objectives by seeking solutions to the following research problems: What is the present status of School Business Management in schools? How does the Certificate in School Business Administration (CSBA) provide the knowledge, skills and attitudes required for that context? What changes or improvements need to be made to the CSBA?

Contextual analysis

Weber (2002) describes the education system under apartheid as divided into 18 departments organized along

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racial lines and characterized by racial and ethnic segregation; limited, undemocratic participation: no interest-group participation; little bureaucratic accountability and transparency; policy processes bureaucratized and top-down; unco-ordinated, duplicative policy functions; no district governance structures; mainly powerless school bodies with no community legitimacy; racial inequality and centralised state power which protected white privilege with decentralising features. The administrative structure in schools under apartheid mirrored these characteristics.

The post-apartheid South African education system has been steered firmly towards a decentralised, school-based system of education management (Department of Education, 2000, 2001). While macro-level policy, strategic development and the budget emanate from the DBE, in every practical sense, educational administration has devolved to the provinces. In turn, the provinces devolve responsibility down to the districts that are then responsible for a number of schools within their district.

Current practice in international trends in educational administration aims for decentralisation to the school-governing body (SGB), school-management team (SMT) and principal level (Barrera-Osorio et al., 2009). The rationale for devolving power to provincial structures and then to the educational districts is that, this should improve the quality of schools by ensuring that the management structures that are 'closer to the action' will become more responsive to local needs and problems.

Crouch and Winkler (2008) argue that the post-1994 legislation and policy reforms "were explicitly oriented at governance and finance, with much less emphasis on management. The goals were, explicitly, to improve equity, efficiency, and quality, and to foster democratic decision-making and a sense of localised communities' rights over the provision of education to their children." At the level of governance, the result was decentralisation, and a "reasonably high degree of school-level autonomy or power."

Effectively, decentralisation of South African basic education has made the provincial legislatures and governments, through the provincial education departments, the source of education budgets and resources, as well as the employers and deployers of teachers and other school-based employees (Naidoo, 2005). Funding allocation at both national and provincial level is determined by formulae partially weighted with regard to poverty (enrolment being the main determinant of a school's allocation).

In theory, schools and their communities, as represented by school-governing bodies, have been given considerable power and autonomy to decide how to spend funding, to source additional non-government funds, to determine the allocation of teachers to posts, including employing teachers funded by themselves, and generally to manage and develop their school's infrastructure.

CONCEPTUAL FRAMEWORK AND LITERATURE REVIEW ON SCHOOL BUSINESS MANAGEMENT

In South Africa, there has not been much research on administration at the school level. There has been research on educational management at the level of educational districts and provincial educational departments. Most of the studies have been on school governance such as school-governing bodies (Brown and Duku, 2008; Bush and Heystek, 2003; Maharaj, 2005; Taylor, 2004), management, such as the principals, HODs, SMT (Ali and Botha, 2006; Hoadley et al., 2009) and leadership, such as principals (Bisschoff et al., 2008; Botha, 2004, 2006). Thus, school-business management has been researched in South Africa under the guise of leadership and management studies, district development and principal development.

One of the earliest articles in South Africa that dealt specifically with school secretaries is the one by Van der Linde (1998). It is a very short article, using data from interviews with two principals, and one which stresses the existing limited literature. It highlights the fact that: "the training of school secretaries has to comply with the needs of the new South Africa"; "Universities in the Republic of South Africa need to take cognisance of the need for the training of school secretaries" (Van der Linde, 1998). He identifies only one chapter dealing with the training of South African school secretaries. This may be found in a book by De Witt (1990); it deals with school administration. Schools in South Africa have two sets of staff, namely: educators and non-educators. Non-educator staff are called support staff, non-academic staff or non-teaching staff.

They are "composed of school secretaries, and maintenance workers, instructional aides, etc., and central office administrative support staff, among others" (Conley et al., 2010). Some schools in the Western Cape have both a school secretary and a school bursar; and in some, there is only one secretary who has to be school secretary and school bursar. Conley et al. (2010) explain: "Support personnel have usually been treated in educational literature and policy discussions as part of the 'task environment' (Thompson, 1967) of the school organisation. They are part of one sector of Dill's (1958) taxonomy of this 'task environment': the 'suppliers of materials, labour, capital, equipment, and workspace' (Thompson, 1967). As such, support personnel might be considered in policy and administration literatures as part of the physical plant of the school, as opposed to persons within the educational core or 'central instructional' delivery function" such as classroom teaching of students (Meyer and Rowan, 1978).

Internationally too, there is a dearth of research on school secretaries and their work (Casanova, 1991) and a 'virtual absence of any literature on bursars' (O'Sullivan et al., 2000). They are the face of the school, the first point of contact for anybody coming to or communicating

with the school (Casanova, 1991). They have been called office wives and office mothers (Casanova, 1991). Wolcott (1973) mentions school secretaries in his ethnographic report on school principals and says that the extent of the secretary's authority is dependent on the location and activity of the principal. When the principal is at school, the secretary's job is restricted. However, in the principal's absence "even a decision on whether or not to make a decision could be important" (Wolcott, 1973).

In order to provide the teaching and learning activities for which schools exist, certain basic administrative, management and leadership tasks have to be fulfilled. As the schools have evolved to cater for the changing demands of their students, and as the provincial education department and the district office have increased their demands – as part of the move to hold schools accountable, the administrative load has increased.

In 2008, the Department of Education "allocated just less than R1 billion to employ more administrative staff, such as typists, clerks, secretaries, bookkeepers, cleaners and caretakers at these schools" (Mohlala, 2008). School business management/administration, as a concept, has largely been developed in the UK.

The idea there was that the principal needed to focus on the management of teaching and learning; and therefore, someone else should be managing the business and administrative issues relating to the school. In the UK, the educational authorities have invested millions of pounds in training bursars to be school business managers. In 2002, the NCSL (National College for School Leadership, now the National College for Leadership of Schools and Children's Services) began the development of a programme for School Business Managers (SBM) in primary, secondary and special schools.

Many schools were already employing staff in a business-management role, with job titles ranging from secretary to school-business manager. The NCSL was charged with creating a professional development programme to provide for this group. They developed the certificate in school business management, as well as other additional qualifications (Southworth, 2010).

The Certificate and Diploma for School Business Managers designed by the NCSL have both made a significant contribution to the training of a cadre of professional school managers who now exercise management roles in areas such as financial management, health and safety, project management and personnel. Training initiatives are now directed at developing all support staff, and not only bursars. Recent research suggests that in the UK, SBMs can save their principals 25 to 30% of their time. Chisholm et al. (2005) confirm that principals' time is largely consumed by administrative activities. The research also indicates that SBMs contribute to a net financial gain of around £16,000 per school per annum. This consists of cost savings of £11,000

and 5,000 income generation from grants and fundraising (PricewaterhouseCoopers, 2010).

School administration and support

The idea of extending distributed leadership to administrative or support staff is challenging in the South African context because the legislation and policy framework only demarcates space for the principal, the school management team (SMT) and the SGB to undertake the 'business administration' of the school.

The primary administrative person in schools has frequently been the school secretary and the other administrative clerks in the school (if the school had more than just the secretary). Administrative clerks perform roles perceived as 'routine admin tasks', such as secretarial tasks and bursarship. Largely, school business administration pertaining to the operational day-to-day functioning of the school as part of the professional management of the school, is considered the domain, job and responsibility of the principal and the SMT (SASA 1996).

School administrative staff are merely seen as part of the resources of the school that are used by the principal and the SMT to manage the school. For example, they provide the principal with information; they file records of important information and provide information on the state of finances at the school. The district office provides them with basic training, such as how to use the telephone and basic computer applications. Clearly, the majority of school administrators in public schools do not perform at the same level (of management and leadership) as do their UK equivalents.

Creating a role for the school administrator

Given the challenges faced in schools today, among which are the need to make efficient use of the available resources, as well as the need to develop new resources to augment those derived from the State, it may be argued that there is already a slow emergent expansion of the SBA role under way at schools that have independently realised the need. However, following the trend with private schools, most of these early innovators are assumed to be already at relatively well-resourced schools.

Bush (2007) however argues that "South Africa's underperforming schools (Ministerial Review, 2004; Pandor, 2006) require a greater emphasis on basic management." Since DBE statistics appear to show a strong correlation between underperforming schools and economically disadvantaged communities, this contention appears to have some merit. Anecdotal evidence derived in this study through interviews with ADAs, administrators and principals shows considerable support for this view.

The Certificate in School Business Administration (CSBA)

The rationale for training school business managers (SBMs) was the belief that they could provide management support to the educators and the head teacher (principal), so that they (the teachers) could focus on the management of teaching and learning. Training in the CSBM model is conducted in the following non-academic business areas, namely: risk management; ICT; financial management; facilities management; human-resource management and office systems management. This programme has primarily been targeted at bursars employed at schools, but within the South African context of a high percentage of no-fee-paying schools, the candidates that attended were mostly general school administrative clerks, including bursars.

The role of school business administrator was conceived as a direct response to a need identified in the Western Cape Education Department (WCED) for dedicated persons to manage the 'business' in revised approaches to school management. The CSBM training model was adapted from the UK and renamed the Certificate in School Business Administration (CSBA).

Baseline study of business administration capacity at schools

The baseline study that follows is, of necessity, less than ideal, having been initiated after the launch of the pilot CSBA course. It is necessarily retrospective and overly anecdotal in parts. However, in adapting the ideal to the practical, we believe we have achieved the aims of a baseline study, as indicated in the following summary. The aim of this baseline survey is to explore the status of the school incumbents who are responsible for school business administration-type tasks. The three elements comprising the baseline study were (in actual chronological order, the outcomes analysis preceded the others), namely: survey questionnaire; outcomes analysis and case studies.

RESEARCH METHODOLOGY

The sample included school administrators from public pre-primary, primary, junior high and high schools across in the districts within the Western Cape Education Department (WCED). This group formed an opportunity sample of 300 school administrators who attended the WCED CSBA course at several further education and training colleges in the Western Cape. As an opportunity sample was used, the data gathered should be seen as providing indicative rather than representative findings. The sample had the advantage of comprising people who were readily accessible, willing to participate, emanating from a variety of schools, and interested in developing the school administrator profession. The sample totalled 300, and of these, 238 completed the survey, giving a response rate of 79%. Frequencies and percentages in SPSS for windows were used to analyse the data. In addition, two case studies were conducted to provide an in-depth view of the situation.

Piloting and refinement of the baseline questionnaire

The questionnaire used for the baseline study was based on previously validated questionnaires. The questionnaire was adapted to the South African context. A simple preliminary random sample of 1% in size was drawn from the WCED public schools' database for a preliminary pilot study – to further refine the questionnaire.

Data collected

The data were analysed to investigate: general information; job titles; previous posts; gender, age and ethnicity; remuneration; the types of schools in which school administrators work, including location, and pupil and staff numbers, and the support to teaching staff ratios; the roles, responsibilities, skills and attributes of school administrators in their schools; the status of the school administrator and key relationships with the SGB, the SMT and the WCED; the training and professional development of school administrators.

A set of 52 job elements considered to be the activities of school administrators were presented to the respondents. They were required to indicate whether they: performed the task themselves; delegated them to another under their supervision; or the task was performed by somebody else, not under their supervision. The questionnaire was thus designed to obtain information about the school administrators' work environment, their roles and responsibilities, their relation with the senior management team (SMT) and the School-Governing Body (SGB), and their qualifications.

Focus of the analysis

The intention was to conduct a purpose-driven or outcomes-based analysis of the skills required of a person who will work in the envisaged position of SBA. In other words, it would define the expectations of those who employ and use the services of the SBA, namely, principals and administration district advisors.

Data analysis

Analysis sessions were conducted with two distinct groups of stakeholders with an interest in the outputs and contribution of the school business administrator: WCED administrative personnel in regional offices and principals in schools. Two different analysis sessions were conducted, in the form of focus-group discussions on 16 September, 2009 with regional office personnel, and on 5 November, 2009 with a select group of principals.

Analysis of the questionnaires

Six (2.4%) of the respondents described their job title as 'bursar'. One used 'admin and bursar', six gave their job title as 'finance officer', one 'line support', one 'line support admin', one 'school secretary', one 'corporate co-ordinator', while the rest used 'clerk', 'admin clerk' or 'finance clerk'. These comply with the fact that, firstly, the attendees at the course were school administrators and not specifically school bursars. Secondly, there are many no-fee-paying schools in the Western Cape that would not have a dedicated bursar. Thirdly, the administrative clerks might be bursars, as well as being responsible for other administrative tasks. Most of the participants in the course (91%) were women. Respondents had an average of 11 years' work experience. Most of the candidates enrolled for the second cohort of the CSBA course were in their mid-career stage. A further 13% were between 50 and 59 years

of age. These percentages suggest that a fair number of administrative staff leave the profession before they reach 50 years of age. It may also be the case that a number of such staff were not permanently employed. The study was not able to obtain data on staff turnover in these positions.

The turnover of staff should be determined at some point, as it has obvious implications, in terms of the long-term cost and viability of the CSBA programme. A large number (51%) of the candidates had worked in education previously, while 16% had financial administration experience. About 70% had worked in the public sector. Only 15% came from the financial sector, which may also include public sector finance. The survey did not probe how the respondents came to be in their jobs, or why they had left their previous sectors, information that might inform recruitment of new entrants to the profession in future. Of the sample, 27% declined to state their professional qualifications.

Of the remainder, 6% had a university degree, 57% had a diploma or certificate (the survey did not differentiate qualifications relevant to the job from the rest), 33% had matriculation only, and 4% had a qualification lower than matriculation. In general, there appears to be a correlation between salary level, education qualification and status. Most of the CSBA candidates of this cohort came from primary schools (61%), with 18% working at high schools and the rest in other school types). The schools varied in size in terms of learner numbers (a mean of 863), teaching staff numbers (27) and service staff numbers (9). Almost all schools (96%) were served by an SGB.

Roles and responsibilities of school administrators

Respondents were asked to indicate the functions that they perform themselves in terms of the responsibility areas: administration, finance, Human Resources, facilities management, information management, ICT, support, and teaching and learning. Administration (51%) and finance (43%) accounted for most of their time, in terms of the functions they themselves performed. Other main functions performed by them were information management, ICT and human resources. Relatively little time was spent on the functions of teaching and learning (16%), corresponding to tasks such as keeping accurate records of learning resources and equipment, explaining the school's curriculum policy to parents, and possibly class supervision when required. There was a relatively even spread of management responsibilities not under the supervision of the administrator, indicating that a high level of administrative management responsibility resided with the principal and other staff.

Administrative activities

The survey gathered responses on the frequency of activities related to the eight areas of responsibility described above. The respondents usually spent their time on the clerical requirements of the school, such as various types of record-keeping. Higher level administrative management activities, such as the analysis of reports, management of legal matters, and the implementation of changes in the school improvement plan were performed with much less frequency.

Finance activities

Administrators are involved with 44% of the financial activities of the school, but the respondents reported very low supervision of others in these activities, which also tend to be of the administrative type. The bulk of the financial management functions, such as the development and the planning or analysis of budgets are performed

by someone else in the school, most probably the principal, the deputy, the senior management team or teachers.

The activities that administrators said they perform most frequently themselves were the keeping of accurate financial accounts, maximizing school income from hiring out school facilities, and fundraising. Given the changes that have taken place with the advent of school fees and additional fundraising needs, there is scope for growing the financial management responsibilities of the school administrator.

Human resources activities

All the respondents indicated that they were involved with all the HRM activities, to a lesser or greater degree. After keeping accurate records (70%), the second most important task (46%) administrators undertook was the administration of staff remuneration. This activity probably occurs more in section 21 schools, where the governing body has the right to employ and remunerate additional staff. More than a third of administrators indicated that they were involved with managing staff contracts and managing temporary staff.

A rather low number indicated that they had responsibility for support staff, to supervise and deploy support staff (20%), and the appointment and induction of support staff (11%). A minority of administrators (below 15%) were responsible for following clear and fair principles of recruitment, retention and the discipline of staff, the appointment and induction of staff, and the appraisal and development of support staff. This is an indication that the senior management team and the principal undertake most of these responsibilities.

Facilities and property management

Responsibilities for property management occupied 22% of their time, mostly activities confined to keeping records of equipment, furnishings and school maintenance programmes (42%), and ensuring the availability of supplies, services and equipment (52%). Activities such as property and ground maintenance and the supervision of building services were done by someone else on the staff.

Information management and ICT management

These two functions have been combined to match the situation where only one subject covers these areas in the CSBA. Administrative staff indicated that they most frequently manage information and communication systems (55%), and keep records of computer hardware and software (46%). As many as 35% indicated that they managed the maintenance of the school's computer system.

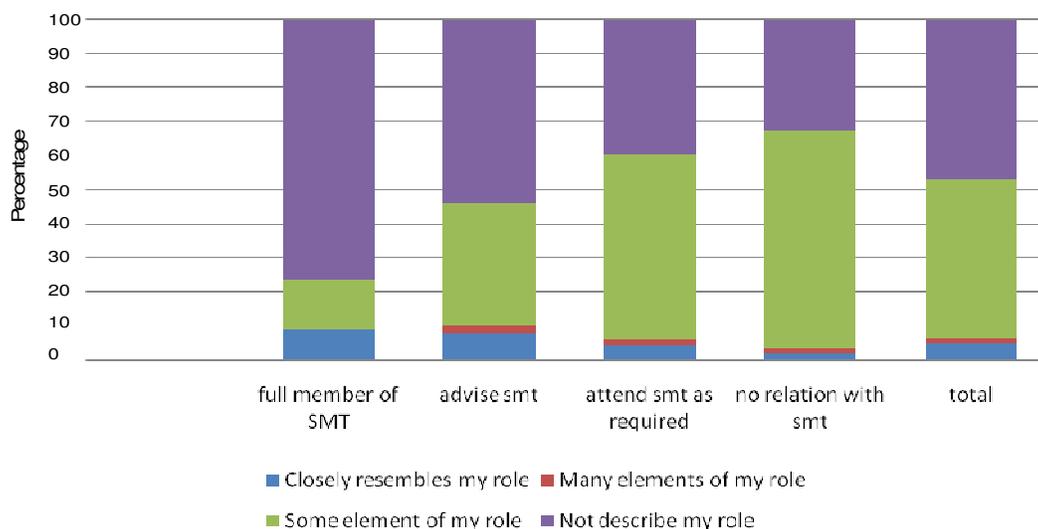
Others at the school performed management functions such as ensuring compliance with legal requirements for ICT, the evaluation of the management information system and participation in strategic planning.

Support services

Only 25% said that they carried out the provision of food services (for example, tuck-shop/catering). A further 20% of the staff said that they performed safety, transport, fire control, medical aid and health, and safety legislation activities. A total of 60% of support services were normally performed by someone not under their supervision.

Table 1. Activity levels.

Level	Percentage
Administration	48
Management	42
Leadership	10

**Figure 1.** Relationships with SMT.

Teaching and learning

Only 35% of administrators indicated that they kept accurate records of learning resources and equipment; while 21% said that they maintained learning resources themselves. Only 7% said that they taught when necessary, while a mere 2% explained the curriculum policy of the school to visitors.

Levels of operation

In order to understand the levels at which administrators were working, the responses to the resource management section of the questionnaire were analysed, and each activity labelled as 'administration', 'management' or 'leadership', resulting in the general assignment of levels of operation (Table 1).

An analysis of the administrative, management and leadership activities of administrators indicated that they were working at three levels across all the different areas of responsibility.

Relationship with the senior management team at the school

Respondents were asked to indicate whether they had full membership status, only advised, attended SMT meetings when required, or experienced no relationship with the SMT (Figure 1). The majority of the responses were that they had a weak or no relationship with the SMT. Less than (10%) indicated that they were full members of the SMT. Their relationship with the SMT was less developed than with the SGB, possibly because legislation makes it possible for support staff to be represented on the SGB.

Administrators and the school-governing body

More than 40% of the administrators said that they had no relationship with the SGB. Encouragingly, however, more than a third indicated that some of their activities allowed them to interact with the SGB. These administrators could thus be the non-academic staff representatives on the SGB, thereby fulfilling the role of attending SGB meetings to take minutes, participating in sub-committee work, and perhaps even playing the role of secretary – or at the very least assisting the principal in the arranging of meetings (Figure 2).

CASE STUDIES

The purpose of the case studies is to provide a picture of school business administration and the role of the school administrators, which is situated within the context of real schools. The case studies form the third element in the baseline study (the survey questionnaire and outcomes analysis formed the other two parts). Together, the three elements provided an adequate basis from which to evaluate the CSBA, and assisted in clarifying the findings and recommendations.

Schools were selected that had a school administrator enrolled on the CSBA programme and data were gathered from their portfolios of evidence and from their participation in focus-group interviews. Schools A, C, D

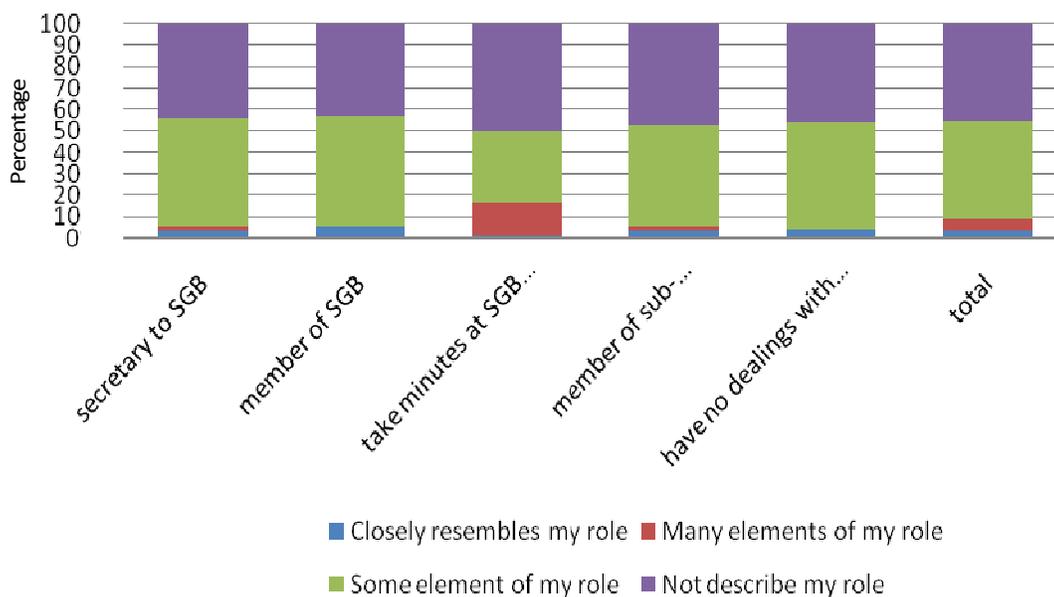


Figure 2. Relationships to SGB.

and E all had a pool of poor learners (all black and coloured), whereas School B was a relatively wealthy public school that had been designated a white school under apartheid (only Schools A and B presented). The case studies depict an unstable and changing demographic population, particularly with schools A, C, D and E. Furthermore, in all these schools, learner numbers fluctuated, as families (many living in informal settlements) moved between different areas.

DISCUSSION FROM THE CASE STUDIES AND FOCUS-GROUP INTERVIEWS

School administrative staff have had to develop their ICT skills in response to the increased use of technology, and the changing systems. Since schools in all categories receive less funding than they need, both from government and from school fees (in the case of fee-paying schools, they need to engage in extensive fundraising). Some administrative staff have management and leadership responsibilities – in the form of their assistance to principals, training principals in some cases, through their involvement on SGBs; and in a few cases, involvement on SMTs. In most cases, this role is not recognised by the educators and the SBAs are not accorded any improved status or remuneration.

Furthermore, there are school administrative clerks who want to take on more of such responsibilities. The case studies illustrate how important the relationship between the SBA and the principal is in contributing to effective school administration. Furthermore, the SBA needs to have a good relationship with the senior educators

in management roles and to be recognised by them.

The case studies, in conjunction with the other data gathered, support the argument that school business administrators can and, in many cases, do play a crucial role in the management and administration of the school. The SBAs in the case study schools benefited from their studies on the CSBA programme.

Conclusion

Among the challenges were the difficulties of studying while working, the heavy workload of the programme, and the challenges of independent learning, the lack of mentoring and practical issues, such as difficulties with transport. Many of the SBAs who participated in the focus-group discussion found that they had learned a lot from the programme and were inspired to implement new ideas. However, they were often constrained from making the type of contribution that they now could by the hierarchical relationships in the school and their low status. "I find it difficult to influence the decision-making, because you know that the way our schools are organised, it's a trickle-down approach in terms of decision-making. Because you as an administrative clerk, you are there at the bottom and the decisions are made from the top to the bottom, from the SMT to the bottom. Then you are pregnant with the ideas you want to implement because you are fresh from the college. You know you've made the research; you know what it is that is not going right in terms of the administration and the management of the school – you have that information. But it is difficult to actually implement that information because of the

position that you are in.”

SBAs recommended that the Education Department should do more to educate other role-players in the schools on the training of the SBAs and the expanded role for which they were being trained. There was clearly a need for active support on the crucial role that SBAs are playing in schools and the need for SBAs to be trained to take on management roles. The findings of the research project have been that the CSBA has been effective in the capacity building of the SBAs who had completed the programme and were thus deemed competent. The content of the programme and knowledge areas that it covered were relevant to SBAs' current needs. Furthermore, they were exposed to information on schools' business management. This 'opened their minds' to ways in which schools could be run more efficiently, and to the role that the school-business administrator could play.

RECOMMENDATIONS TO THE CSBA PROGRAMME

- i. Facilitators should be exposed to the working conditions in the schools before presenting the course. The insights gained should be incorporated into the course content and presentation. However, facilitators who facilitated the pilot course have become quite competent through having learnt from their experience in the pilot program.
- ii. An instrument such as a pre-qualification test should be developed that assesses the candidates' readiness to participate in the course, before the person can be accepted.
- iii. All principals should be compelled to attend a conference on school business administration and the CSBA, to enable them to understand and to champion the course.
- iv. The CSBA course material and language of presentation should be reviewed against current assumptions on participants' academic readiness, language competency, emotional intelligence, technology literacy and research skill. Adjustments should be made where necessary.
- v. No candidate should be allowed to attend the course unless the SGB has approved him/her, and has minuted the nature and extent of the support the school will offer the candidate.

Improvements and support

The role of the school business administrator should be professionalised and awarded the appropriate status – either through job enlargement of the existing school administrator or via the creation of a new post of school business manager. The skills facilitator should also work closely with the school administrators to provide them with the necessary ongoing training.

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