

A PERFORMANCE MANAGEMENT FRAMEWORK FOR SELF-MANAGING SCHOOLS IN AN EMERGING ECONOMY

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Abstract

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The integrated quality management system (IQMS) as a performance management framework is mostly inadequate for school-based performance management. Literature branded it as a compliance system (Mamabolo et al., 2022) that does not allow school stakeholders the independence to take part in developing their own strategies. The study debates the amalgamation of the IQMS and the balanced scorecard (BSC) to develop a framework for self-managing schools in an emerging economy. Semi-structured interviews with members of schools' management teams, were conducted and a qualitative research approach guided this study based on a design-based research (DBR) method. Our results show that a school-based performance management framework must be distinct, have a mission-focused strategy, involve all stakeholders, and be time efficient. Further, our results suggested that the performance management framework be updated on a regular basis to drive the school's base strategy, learner academic and extracurricular achievement, and stakeholder satisfaction. While the IQMS links to managerialism (Mpungose & Ngwenya, 2017), the researchers argue that self-managing schools are linked to the participatory democracy theory (PDT) and accommodate stakeholder involvement. The framework combines the valuable criteria of the IQMS with the benefits of the BSC to contribute towards performance management in public schools.

Keywords: Balanced Scorecard (BSC), Integrated Quality Management System (IQMS), School-Based Performance Management, Schools' Governing Bodies, Self-Managing Schools

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1. INTRODUCTION

Prior to South Africa's first democratic election in 1994, the education system was characterised by racism and inequality (Moloi, 2014; Moorosi, 2021). Furthermore, education systems were structured

and customised for the different race groups in the country (Amos et al., 2021). This led to different types of evaluation for the different race-related systems and resulted in continued inequality through race and class (Khilji et al., 2022; Reitzes, 2009). Policymakers are trapped in what could be best

described as a balancing act between the fight for economic effectiveness and the necessity for the justifiable distribution of resources. These two poles can be referred to as “conflicting demands for global competitiveness” and “being responsive to the needs of the majority of who belong to what has been accurately described as the second economy” in South Africa (Mpungose & Ngwenya, 2017, p. 7). Thus, stakeholder engagement is essential to redress the inequality of the past in post-apartheid South Africa. This type of framing suggests a holistic approach to self-managing school where every actor is not only informed but satisfied. The challenge is a decision around policy deliberations that recognise the history of South Africa and can take forward the transformational agenda of 1993 into education systems.

Moreover, the quest to meet international demands in education and the adoption of public management approaches based on global transformation trends have occurred in education standards during the past two to three decades (Moorosi, 2021). According to Mestry and Makoelle (2021), one of the significant changes is a shift towards self-managing schools. The ideologies perhaps need refocusing on the current realities of South Africa in terms of school governance and education acts. While policies on these, cannot be changed, lessons from international literature provide a shift to policy review in relation to self-managing schools. For instance, the appearance of the concept of self-managing schools can be observed in the school management literature (Amos et al., 2021; Radzi et al., 2018; Magpili & Pazos, 2018; Mpungose & Ngwenya, 2017). For example, in developed countries such as the United Kingdom (UK), the United States of America (USA), New Zealand and Australia, there was a prominent move towards self-managing schools (Caldwell & Spinks, 1988; Mestry, 2016; Mpungose & Ngwenya, 2017). Education in South Africa also followed this trend specifically after the country’s first democratic election in 1994. Thereafter, the quality of education and continuous funding thereof remained a challenge. These two dynamics can rephrase the argument of self-managing schools in South Africa to a bigger issue of which stakeholders’ expectations could be ignored or satisfied, to bring about change in the education system.

Self-managing schools are defined as autonomous units with significant decentralisation of decision-making power and resource distribution to encourage improvement and ensure sustainability (Mestry, 2016; Magpili & Pazos, 2018). Self-managing schools in South Africa implicate a collective authority by schools’ governing bodies (SGBs), composed of parent, teacher and learner representatives, and school management teams (SMTs), composed of mainly the principal, deputy principal and subject specialists (Department of Education, 2004). Section 2A of the South African Schools Act No. 84 of 1996 legally delegates management power of all public schools to their SGBs and founded the self-management of public schools in Sections 20 and 21 of the Act No. 84 of 1996. Section 20 provides decision-making and control authority regarding policies and finance to SGBs of the so-called Section 20 schools. In addition, Section 21 of the Act No. 84 of 1996 provides additional, financial functions to the so-

called Section 21 of the Act No. 84 of 1996. Decentralisation of school management came with many challenges and augmented the risk of increasing inequalities between public schools in diverse communities (Mestry, 2018). Thus, decentralisation is further considered from social and structural inequalities that pose problems to integrated quality management system (IQMS) implementation. The balance of power is assumed in the decentralisation process, particularly for schools in rural areas. The literature on the performance of public schools in South Africa revealed that the majority of these schools are poorly managed (Moorosi, 2021; Mestry, 2018; Magpili & Pazos, 2018). In 2021, the report on the National Senior Certificate Examination for 2021 (Department of Basic Education [DBE], 2021c) serves as evidence of learners’ poor academic performance. Although this problem was stated in the National Development Plan in 2011, it still persists (National Science and Technology Forum, 2019). As a result, it was necessary to review the policies in order to replicate the democratic principles that would allow for schools’ evaluation. This problem is interlinked. One aspect is whether there is evidence of critical engagement with the IQMS for an improved curriculum towards academic performance. Another is the power of SGBs and how much of it, influences the ability to engage and achieve quality at schools.

In 2003, the DBE introduced the IQMS to enhance performance management in schools. This system contains three programmes. The developmental appraisal programme for teacher development, the performance measurement programme for teacher assessment, and the whole school evaluation (WSE) system for assessment of the school as a whole (Education Labour Relations Council [ELRC], 2005). Pylman (2014) and Dereso et al. (2021), in their studies conducted on IQMS performance, observed that all three programmes are dis-amalgamated and lack unification for continuous improvement. The lack of unification cannot be argued against policy but largely could be the problem of understanding the IQMS in the organisational structure of schools. The study concluded and highlighted that there was a lack of cohesiveness between the various performance criteria of the IQMS. Moreover, the ineffective management of resources is also highlighted as a major concern contributing to the poor performance of schools and learners.

A review of the management infrastructure system by the DBE in 2021, revealed that almost 15% had a defective, or no electricity supply and almost 25% had a defective, or no water supply, and no sports facilities (DBE, 2021b). The DBE Annual Report 2020/21 mentioned some improvements but confirmed that the poor and inadequate infrastructure of schools in poor communities is still a huge challenge (DBE, 2021a). Similarly, the IQMS performance evaluation systems were all traditional approaches where school inspectors were exclusively responsible for the evaluation of teachers’ and schools’ performance (Moorosi, 2021). Furthermore, the traditional approaches also come with different challenges of political unfairness, unrestricted power of inspectors, the inability of some inspectors, the irrelevance of some assessment standards, not considering circumstantial factors, and the use of

the evaluation as a disciplinary measure rather than a developmental measure (Tachie & Mancotywa, 2021; Ntombela et al., 2010).

This paper proposes combining the IQMS and the balanced scorecard (BSC) to create a school-based performance management framework for self-managing schools in South Africa and elsewhere. The paper also intends to investigate IQMS's contribution to school-based performance management and how the BSC can benefit South African schools. The practical limits of the WSE system, as well as the requirements for a school-based performance management framework, will be investigated. The idea of education centralisation is related to power and politics that have led to a call for accountability. In other words, the push towards decentralisation needs an examination of proximity to power and accountability in relation to the management of resources at schools. In the South African context, systemic issues that are largely cultural and political may have influenced the thinking around this topic.

The rest of the paper is organised as follows. Section 2 of the paper contains a review of the literature. Following that, Section 3 describes the study methodology. Section 4 presents the results, Section 5 discusses them, and Section 6 presents the paper's conclusion, policy implications, and contributions.

2. LITERATURE REVIEW

The development appraisal system and performance measurement system, implemented in 1998, and the WSE system, implemented in 2001, raised some serious concerns, for instance, frustration about the introduction of these systems in South African schools, the subjective and judgmental nature of the systems, and the lack of development opportunities for teachers (de Clercq & Shalem, 2021). The issues and the urge of the DBE to improve education in schools led to the implementation of the IQMS in 2003 (Mamabolo et al., 2022). The IQMS was developed by incorporating the developmental appraisal, performance measurement and the WSE into one system (Mamabolo et al., 2022), which is used as a performance management system by South African schools and consists of developmental appraisal performance measurement alongside the WSE. In 2022 the DBE implemented a revised quality management system with the purpose of improving the relationship between the different quality management programmes and to ensure that the programmes inform and reinforce each other (ELRC, 2020). Research on the effectiveness of this new quality management system is limited because it was only implemented in 2022. However, a review of the Collective Agreement document (ELRC, 2020) highlighted some minor changes to the developmental appraisal and performance measurement programmes, while no changes to the WSE programme are mentioned. Thus, whether it fits in the South African education system and political realities is a question of policy.

Mamabolo et al. (2022) highlight the ineffectiveness of the IQMS for school-based management, referring to it as a one-size-fits-all, compliant exercise. In the same sense, Mpungose and Ngwenya (2017) refer to the IQMS as "another striking example of

managerialism" (p. 11). Managerialism suggests the synthesis of philosophy and management expertise to establish itself methodically in the organisation and community, depriving stakeholders and communities of the autonomy of self-management (Goldberg et al., 2019). Instead of creating a constant improvement culture, this managerialism-orientated policy colonises school cultures and creates a compliance culture (Mpungose & Ngwenya, 2017). The researchers argue that managerialism stands directly in contrast with self-managing schools' diverse cultures and environments, framed by the participatory democracy theory (PDT). Koenane (2018) concurs by referring to the decentralisation of school-based management as an ineffective, incoherent, one-size-fits-all approach to a performance management system.

2.1. Structure and responsibilities

The implementation of the IQMS in each school is the responsibility of the principal, who is assisted by the SMT (ELRC, 2005). The principal facilitates the democratic election of the staff development team, which is responsible for the overall coordination of the IQMS implementation; it is the responsibility of each teacher to identify their own development support group (DSG) and conduct their own self-evaluation. In addition, the teacher must ensure that their personal growth plan is completed in collaboration with their DSG, which is critical for self-evaluation and reported performance and growth (Scherman & Fraser, 2017).

2.2. The whole school evaluation system

The evaluation criteria of the WSE system were used as a starting point to develop a preliminary framework for this study. The system was implemented to manage schools' performance and to enhance coherence between supervisors on the overall performance of schools (Mamabolo et al., 2022; Goldberg et al., 2019). Also, it is to assist the DBE to identify good performing schools and to support underperforming schools. The WSE system is comprised of nine major performance areas: teaching quality and teacher development; learner achievement; curriculum provisioning and resources; basic school functionality; leadership, management, communication; governance and relationships; security and discipline; school safety, school infrastructure; and parental and stakeholder involvement (Department of Education, 2002). Each performance area of the WSE system is made up of performance standards and criteria applications.

2.3. Challenges with the application of the integrated quality management system

The IQMS application is to assess the level to which schools meet the DBE's goals, and ways of identifying schools that require support (Goldberg et al., 2019), however, its implementation came with numerous problems. For example, the process of designing the IQMS lacked consultation with all stakeholders (Budeli et al., 2022). In particular, Dehaloo and Schulze (2013) emphasised the concern that the crucial input of SGB members, parents, and

communities of self-managing schools is disregarded and that the IQMS cannot be implemented as a school-based performance management system as a result. The system's failure was largely attributed to inadequate principal and teacher training (Budeli et al., 2022). Also, the Department of Education ignored the policy, placing the responsibility for good performance solely on schools (Dehaloo & Schulze, 2013; Budeli et al., 2022). The SGBs, SMTs, teachers and unions continuously criticise this lack of support from the department. The IQMS cannot be trusted because some teachers provide untrue scores that do not accurately reflect the performance of the school and do not contribute to school-based performance management because of the emphasis on salary progression and monetary gains (Mamabolo et al., 2022). The managerialism philosophy, that grounds the IQMS creates bureaucratic and neoliberal schools that do not allow flexibility. This has further created a culture of compliance and substantially limited the use of the IQMS as a school-based performance management system. This also highlights the reason to examine its effectiveness in the South African school context. Otherwise, it jeopardises the reliability of the IQMS results. Moreover, teachers and principals complain that the IQMS is time-consuming and that the school's timetable does not provide time for its implementation, resulting in learners being left unattended while assessments are done (Mamabolo et al., 2022). These findings are the feedback of schools in South African environments in terms of management and leadership. The stakeholder engagement at schools provides evidence of how IQMS implementation may challenge managerialism and neoliberal ideologies in policy implementations.

This paper argues that self-managing schools rather belong to the PDT. This theory permits all stakeholders the freedom to influence matters concerning them (Androniceanu, 2021; Omorobi et al., 2020; Lemmer & van Wyk, 2004). This further links the PDT to transparency in the management of schools. Mpungose and Ngwenya (2017) stated that schools in poorer communities, which include the majority of South African schools, experience serious problems. As a result, the Education Laws Amendment Act No 24 of 2005 was added to allow for no-fee schools and to ensure that all students have access to education (South African Government,

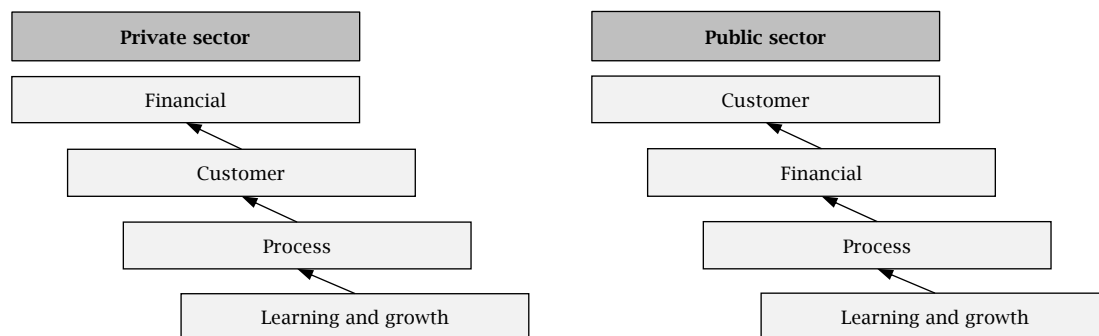
2006). Self-managing schools need to develop their mission statements, strategies and action plans and take responsibility for their financial management. Androniceanu (2021) stated that in order to manage these schools effectively, management must concentrate on their missions, establish accountability, link strategy to mission and budgets, and manage performance. The concept of managing performance and linking it to strategy and budget was embraced by Kaplan and Norton (1996) who developed the BSC. The BSC provides a framework and procedures for tying together measures, strategies, and budgets (Niven, 2008; Kaplan & Norton, 1996). The BSC, as a basic framework for this study, could thus contribute to school-based management.

2.4. The balanced scorecard model

The difference between businesses and educational institutions is that the main goal for businesses is to maximise profit, while the primary objectives of educational institutions are non-financial. However, financial performance has a major influence on the stability and service delivery of public sector organisations (Zawawi & Hoque, 2020; Yüksel & Coşkun, 2013). The BSC offers a balance between financial and non-financial measures that support organisations to focus on strategy. According to Yüksel and Coşkun (2013), the BSC can be used with great success to motivate and assess performance in schools. The benefits of the BSC are summarised by Ratnaningrum et al. (2020) as follows: converts vision and strategy; sketches strategic relationships to integrate performance throughout the organisation; communicates goals throughout the organisation; links all employees with the organisation's strategy; assists all employees in understanding their roles; provides a basis for incentives; and provides feedback on actual performance.

Kaplan and Norton (1992) presented the BSC for the private sector in 1992. Although the BSC was repeatedly adjusted over the years for use by the public sector, Kaplan and Norton (2001) and Niven (2008) concluded that the BSC perspectives need to be adjusted to fit the public sector's structure. Figure 1 demonstrates the difference between the perspectives of the BSC for both the public and the private sector.

Figure 1. Difference between the private and public sector BSCs

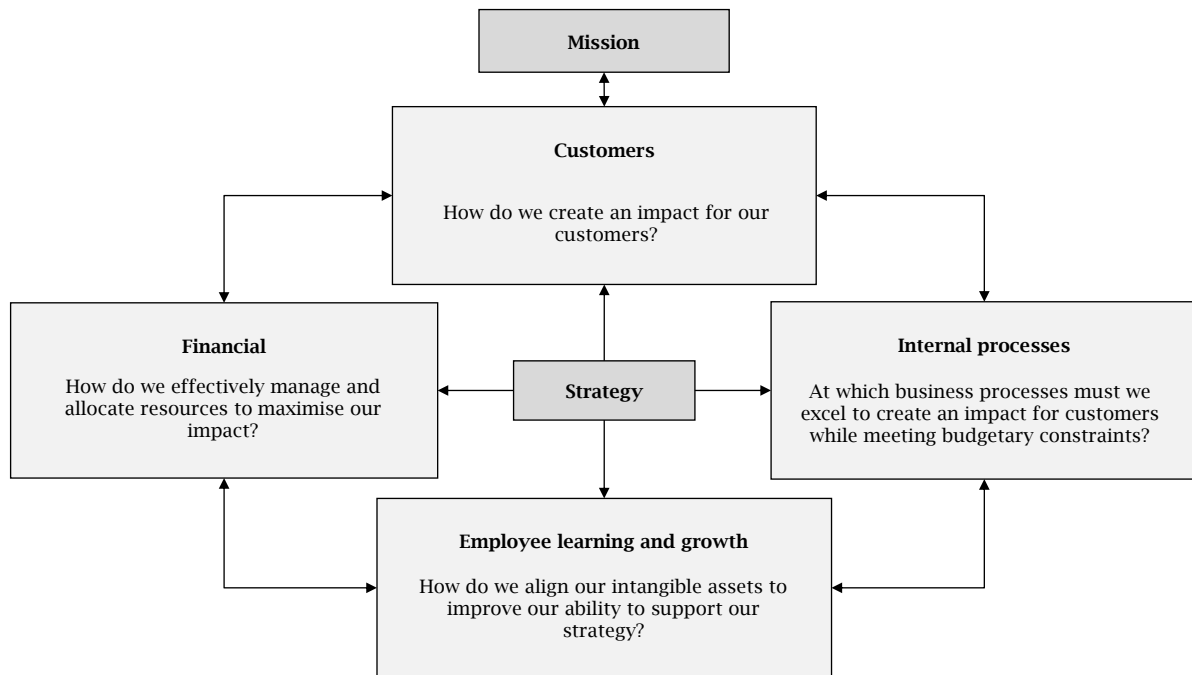


Source: Smith (2012).

As depicted in Figure 1, the customer perspective occupies the most important position in the public sector BSC, while the financial perspective takes a less important position. This is because

the focus of the public sector is service delivery to customers (Lee, 2006). The changes in the order of the perspectives for the public sector BSC are also shown in Figure 2.

Figure 2. The public sector BSC



Source: Niven (2008, p. 32).

As illustrated in Figure 2, the mission appears at the top of the public sector BSC because it forms the focus that drives public sector organisations (Bryson, 2018; Niven, 2008). Strategy links the organisation with its environment and serves as an extension of the mission, forming the core of the BSC (Bryson, 2018). The strategy directs the energy of the organisation's workforce in the direction of the mission and guarantees that the entire workforce concentrates on achieving the overall objectives.

A BSC strategy map depicts the relationship between objectives and perspectives, emphasising the critical goals and activities required to realise the organisation's mission. Customers of self-managing schools in this case are the community, parents, and students who benefit from the service. This emphasises the PDT, and that schools' management needs a clear understanding of customer expectations. To give life to the customer objectives, the internal processes perspective forms the service delivery system (Zawawi & Hoque, 2020) and inspires new processes (Niven, 2008; Shibani & Gherbal, 2018). This perspective guarantees timely consideration of the effectiveness of practices to ensure the realisation of the schools' missions (Zawawi & Hoque, 2020).

The employee learning and growth perspective objectives accommodate the combination of soft skills and skills that are critical to driving the internal processes of organisations and cover more than 75% of the value of public sector organisations (Zawawi & Hoque, 2020; Niven, 2008). Service delivery, however, needs resources from a financial perspective. Financial perspective measures drive strategy and provide cost-effective and efficient service mechanisms for an organisation in order to identify financial objectives (Zawawi & Hoque, 2020; Niven, 2008). Specifically, schools need to consider the cost of resources and the improvement of the school's revenue and financial system.

2.5. Application of the balanced scorecard in public schools

According to Yüksel and Coşkun (2013), the use of the BSC by secondary schools' management is beneficial because it serves as a strategic performance management system that focuses on strategy and improves activities related to the school's missions. According to Rahayu et al. (2023), using the BSC to assess the performance of public schools can provide comprehensive evaluation results. In the USA, the BSC is used to assess school performance at the district level, rather than at the school level. Fulton County first implemented the BSC in 2001, and it has since been expanded to almost all school districts. According to Argüden et al. (2000), schools in the Atlanta School District transitioned from low-performing to strategically focused. Cowart (2010) reached the same conclusion about Monroe County Public Schools, Aldine Independent School District, and Montgomery County Public Schools. The BSC also played a significant role in the high success rate of urban secondary schools in developed economies (Quesado et al., 2018). Even though this evidence of BSC use in schools was in different situations, it demonstrates that it is a useful tool for school performance management. As a result, the BSC was chosen as the study's foundation.

The BSC focuses on strategy and not on control and, therefore, belongs in the knowledge management theories, which assume that knowledge forms the basis for creating value and has a profound effect on all aspects of management (Ratnaningrum et al., 2020). As one of the knowledge management theories, the resource-based view (RBV) regards resources as critical to improving organizational performance (Assensoh-Kodua, 2019) and assumes that organisations' competitive advantage is grounded in their different available tangible or intangible

resources and the application thereof (Assensoh-Kodua, 2019). Figure 3 depicts self-managing schools as located in the PDT, allowing schools their

diversity and, on the other hand, the IQMS in managerialism where diversity is denied.

Figure 3. Theoretical location of the study

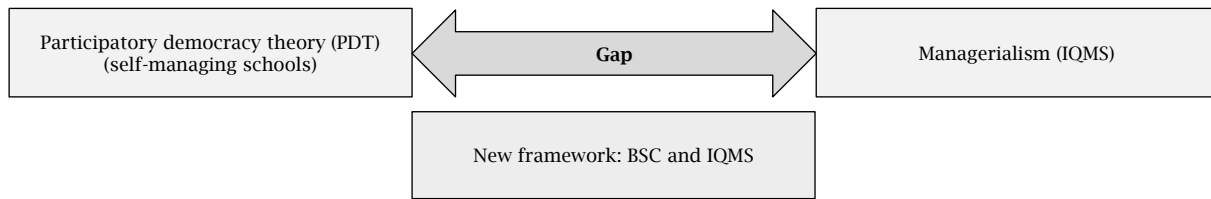


Figure 3 demonstrates how the theoretical gap might be narrowed by using the BSC as a basis to develop a school-based performance management framework for South African schools. The envisaged school-based performance management framework, grounded in BSC principles, accommodates RBV assumptions and places the diversity of schools and their resources central to having a better fit with the PDT theory.

3. RESEARCH METHODOLOGY

This study follows a qualitative approach. Qualitative research has a loose structure and is regarded as the best approach for exploratory studies (Blumberg et al., 2008). Therefore, the study depended mainly on the opinions and interpretations of participants and their understanding of the phenomenon. The difficulties with school-based performance management in South African public schools highlighted in this study are a practical issue in a real-world context. Action research is when researchers collaborate with organisations and participate in activities to find solutions to real-world practical problems (Plomp, 2013; Coughlan & Coughlan, 2002; Salo & Rönnerman, 2023). Design-based research (DBR) is a sub-design of action research and specifically intends to create knowledge that can contribute to the resolution of difficult, practical problems (Plomp, 2013). Therefore, a DBR design was selected to develop the framework. According to Wang (2020) and Amiel and Reeves (2008), the following four DBR phases guided the research process:

1. Problem confirmation phase.
2. Development of a preliminary solution, based on existing frameworks.
3. Refinement of the solution based on the views of practitioners.
4. Reflection on the development process and presentation of the final solution.

3.1. Research process and approach

The IQMS system and BSC were used as the foundation for developing a preliminary framework in the first phase. The second phase consisted of two cycles. In cycle 1, one practitioner from each of the four schools was interviewed. These interviews were twofold. Firstly, to gather information regarding the extent of the problem with IQMS as a school-based performance management system; secondly, to review the preliminary framework presented to them. Cycle 2 entailed a second round of interviews with three practitioners from each

school. These interviews aimed to further refine the presented reviewed framework. The third and final phase entailed a reflection on the processes to present the final framework.

Four South African public schools from communities with diverse backgrounds in the City of Tshwane Metropolitan were selected for the empirical data collection in phase 2. Data were collected from a purposeful sample of principals, parent representatives, and SMT members based on their experience and involvement in school performance management. The sample size was kept small enough to collect in-depth new knowledge and understanding. For cycle 1, four interviews with the four principals were conducted. For cycle 2, each school's principal, one SGB member, and one SMT member were targeted. In two instances principals stated that SGB members were unavailable. In one of these instances, a teacher involved with the IQMS was interviewed, and in the other, only two participants were interviewed. For this cycle, 11 interviews took place. All participants were full-time staff members or SGB members. Semi-structured interviews were used, with a small number of open-ended questions to guide the process. This allowed participants to freely share their experiences and opinions. The open-ended questions enriched the investigation of the IQMS as a school-based performance management system. All participants gave their permission, and the interviews were audio-recorded.

Guba's framework of credibility, dependability, transferability and conformability was used to ensure trustworthiness in qualitative research (Krefting, 1991). To ensure credibility, the researchers used probing throughout the interviews and member checking after transcription of the interviews. To ensure participants' anonymity all transcripts were anonymised by removing participants' names. The transcriptions of the interviews were returned to the participants for final validation, and as previously stated, a second coder was used to ensure data reliability. To increase dependability, at least one dataset from each cycle was interpreted by peer experts. In terms of conformability, the researchers reduced the possibility of bias by acknowledging and focusing on the fact that their likely subjectivity could bias the study.

The study's ethical considerations were based on the Belmont Report (Department of Health, Education, and Welfare, 1979), which emphasised respect for people, beneficence, and justice as key points (Kivell et al., 2017). The researchers gave each participant a letter of consent, emphasising their right to participate, not participate, or withdraw at any

time. The DBE of Gauteng granted ethics approval and permission for the study. Throughout the data collection process, the researchers were constantly on the lookout for and addressing potential participant uncertainty and discomfort. The study was limited to four secondary public schools in one Tshwane Metropolitan urban district.

3.2. Data analysis

Data for phase 1 came from the WSE system's evaluation criteria. To reduce the number of criteria, these criteria were coded by grouping them and identifying different categories. In the form of a strategy map, the researchers then attempted to synchronise these categories with the BSC concept. The data for phase 2 were gathered through the previously mentioned interviews. The data were sorted into themes related to the BSC using content analysis. Reading through the transcribed interviews, identifying themes, and categorising the data resulted in the data being coded. For phase 3, the data were further subdivided to identify suggested objectives and finalise the framework. To ensure dependability, the researchers used a second coder in both data analysis cases. During the preliminary framework development phase in phase 1, the data analysis revealed that some WSE criteria did not fit any of the BSC perspectives, which were kept separately for review during the following phase for possible inclusion. Data were further coded to identify the main categories within each BSC perspective, as well as possible links between the criteria in the various perspectives. The wording of the main categories was slightly changed to begin with verbs, in accordance with Niven's (2008) requirements for objectives. The preliminary framework was created by plotting the main objectives and their connections on a BSC strategy map. Some objectives were clearly linked to more than one other goal. The strategy map started with the DBE's mission statement.

4. RESEARCH RESULTS

The first goal of phase 2, cycle 1 was to identify the practical limitations of the WSE system in developing essential principles to serve as guidelines for the framework's development. For a school-based performance management framework, the following design principles were identified:

- the framework needs to be adjustable for school-based performance management to fit schools' unique characteristics;
- the framework must link objectives with one another to form a mission-focused strategy;
- the framework must provide for the involvement of all stakeholders;
- the framework must be simple and time-efficient.

The preliminary framework was reviewed as the second goal of phase 2, cycle 1. The suggested changes were divided into three major performance areas: customer perspective, links between objectives, and objectives that did not fit the BSC perspectives. To drive the strategy, the mission was once again placed at the top of the framework. Learner academic achievement, learner extracurricular achievement, and stakeholder satisfaction were

identified as the three main performance areas. In the preliminary framework, these areas were separated to simplify the complicated links between the objectives in the various perspectives. The researchers added a management perspective to accommodate the criteria that did not fit the BSC strategy map, based on Niven's (2008) argument and suggestions from participants. The management perspective was placed after the employee learning and growth perspective and just before the financial perspective.

The reviewed framework guided the interviews during cycle 2 of phase 2 under the three main performance areas, two participants identified policy, technology, and training, but all other participants agreed on the three main performance areas (Ratnaningrum et al., 2020; Zawawi & Hoque, 2020; Niven, 2008). Our results showed that policy and technology affect all aspects of a school and thus fall under all three major categories, whereas training is accommodated by the employee learning and growth perspective. The interviews further revealed a close association between these three areas and that stakeholders' satisfaction is directly related to learner achievements. Participants were concerned that the employee learning and growth perspective only referred to employees and did not accommodate SGB members; that the term "customers' perspective" did not fit schools, while the financial perspective should also provide for other resources. Participants also identified a link between the employee learning and growth perspective, the management perspective and the financial perspective. The identified design principles, and the preliminary framework and findings from phase 2, were used during phase 3 to reflect on the processes and finalise the framework (see Figure 4).

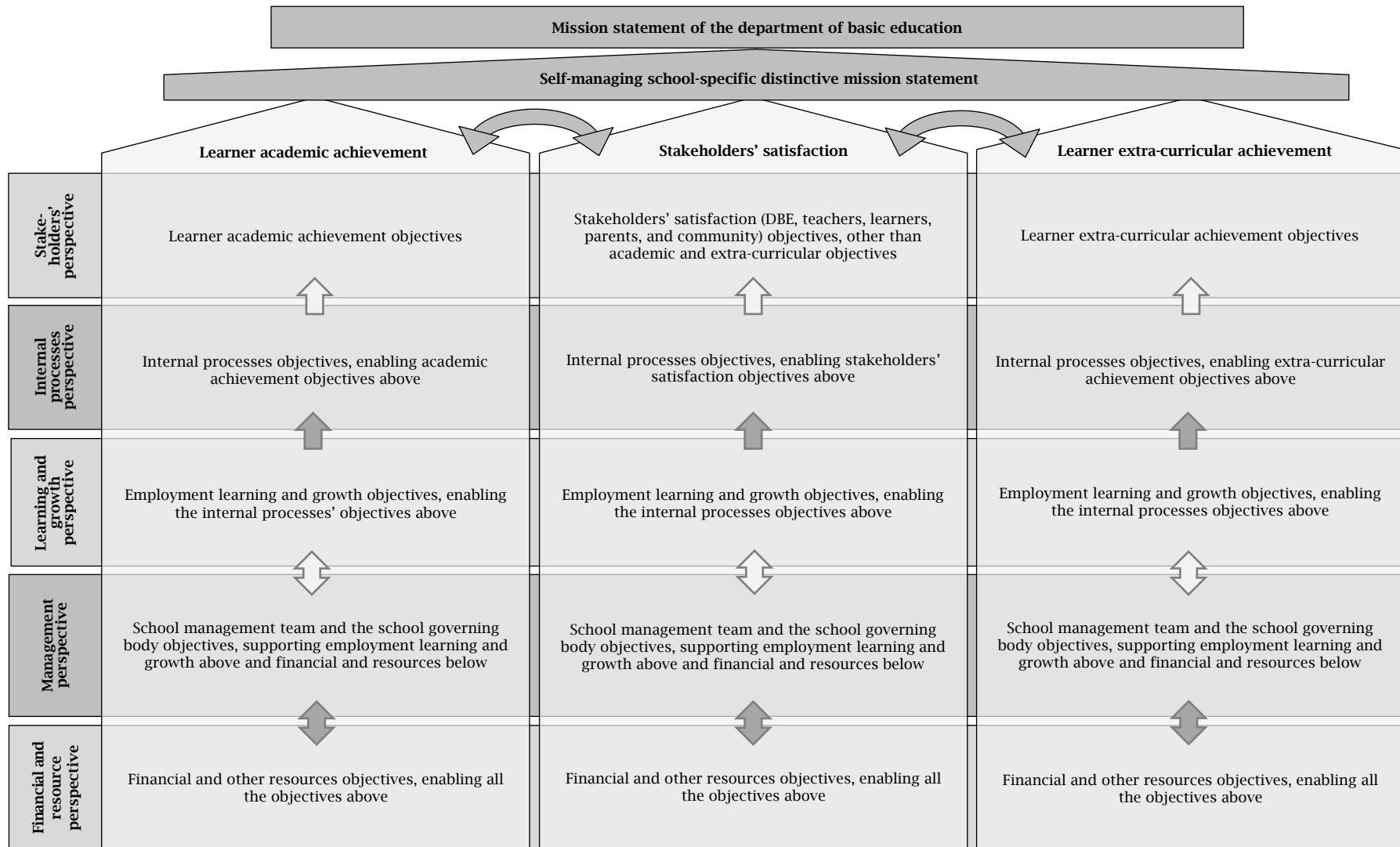
5. DISCUSSION

The framework in Figure 4 begins with the mission of the DBE, which directly links to the school-specific distinctive mission. The framework is divided into three main areas which are: learner academic achievements, stakeholder satisfaction and learner extracurricular achievements. The stakeholders' satisfaction area is placed in the centre because it is affected by the other two areas as indicated in the findings. These performance areas consist of the following five perspectives as modified according to the findings:

- stakeholders' perspective;
- internal processes perspective;
- learning and growth perspective;
- management perspective;
- financial and resource perspective.

In line with the identified design principles, the framework does not bind schools to specific objectives but allows stakeholders to identify their own unique objectives within the specific areas. The arrows in the framework represent the critical links between the objectives that must be maintained to ensure an effective mission-driven strategy. Some of the arrows point in both directions, indicating that the objectives have an impact on the objectives from the top and bottom perspectives, as indicated by the results.

Figure 4. The school-based performance management framework



The identified links of objectives in the different perspectives, as depicted in Figure 4, guide school management to set their own unique objectives that connect with the objectives in the other perspectives. In addition, the objectives in the learner achievement performance area and learner extra-curricular achievement performance area will affect the stakeholders' satisfaction performance area. Using the framework should allow school management to set objectives that will support the school's mission and add positively to the school's strategy.

6. CONCLUSION

South Africa needs an efficient schooling system that is central to the government's National Development Plan for 2030. As a real-world solution, this study offers a school-based performance management framework, theoretically founded in the RBV. This makes the framework more compatible with the PDT theory assumptions allowing flexibility for South African self-managing schools. The foremost contribution of the study would be the enhancement of the performance and efficiency of South Africa's school education through school-based performance management based on the BSC benefits. The study could change policies and ensure that mission-driven schools best serve their communities. The framework might be used to empower management to make informed decisions, develop strategy, manage resources and improve service delivery. It might also assist in driving fair, reliable incentives for teachers and learners. By ensuring the involvement of communities and all stakeholders in strategy and performance management, the framework might contribute towards a positive attitude and involvement of stakeholders. Problems with flexibility in the system,

due to duality, highlighted in the study, might be addressed if the study influences changes to the current performance management systems of the DBE. This might lead to a revised, fit-for-purpose system, contributing to the improvement of the performance of all schools, specifically also the schools in poor communities. The findings also contribute to narrowing the information gap on the use of the BSC as a school-based performance management system and reveal the usefulness and limitations of both the IQMS and the BSC.

The school-based performance management framework combined the IQMS and BSC performance areas, while literature and empirical data revealed the IQMS's perceived ineffectiveness and the BSC's usability in this context. However, because the developed framework was not tested in practice, additional research on the framework's effectiveness in practice over a longer period of time may be beneficial. The study's primary goal was to increase flexibility in performance management and to allow for the development of unique school-related objectives that will ensure the realisation of the school's unique mission. Measurements could be very diverse and were not included in this study. Identifying measures for all aspects of the framework may be difficult, and because there is limited literature on school-specific management measures, more research on the topic may be valuable. This study assumes that school-based performance management encompasses more than just student academic performance and includes the management of school resources, which have a significant impact on school service delivery. As a result, additional specific research on the management and measurement of school resources will add to the body of knowledge.

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