

African Virtual University

Education: Education EDU18

Managing a School's Educational Resources

Neola Jemutai

Foreword

The African Virtual University (AVU) is proud to participate in increasing access to education in African countries through the production of quality learning materials. We are also proud to contribute to global knowledge as our Open Educational Resources (OERs) are mostly accessed from outside the African continent. This module was prepared in collaboration with twenty one (21) African partner institutions which participated in the AVU Multinational Project I and II.

From 2005 to 2011, an ICT-integrated Teacher Education Program, funded by the African Development Bank, was developed and offered by 12 universities drawn from 10 countries which worked collaboratively to design, develop, and deliver their own Open Distance and e-Learning (ODEL) programs for teachers in Biology, Chemistry, Physics, Math, ICTs for teachers, and Teacher Education Professional Development. Four Bachelors of Education in mathematics and sciences were developed and peer-reviewed by African Subject Matter Experts (SMEs) from the participating institutions. A total of 73 modules were developed and translated to ensure availability in English, French and Portuguese making it a total of 219 modules. These modules have also been made available as Open Educational Resources (OER) on oer.avu.org, and have since then been accessed over 2 million times.

In 2012 a second phase of this project was launched to build on the existing teacher education modules, learning from the lessons of the existing teacher education program, reviewing the existing modules and creating new ones. This exercise was completed in 2017.

On behalf of the African Virtual University and our patron, our partner institutions, the African Development Bank, I invite you to use this module in your institution, for your own education, to share it as widely as possible, and to participate actively in the AVU communities of practice of your interest. We are committed to be on the frontline of developing and sharing open educational resources.

The African Virtual University (AVU) is a Pan African Intergovernmental Organization established by charter with the mandate of significantly increasing access to quality higher education and training through the innovative use of information communication technologies. A Charter, establishing the AVU as an Intergovernmental Organization, has been signed so far by nineteen (19) African Governments - Kenya, Senegal, Mauritania, Mali, Cote d'Ivoire, Tanzania, Mozambique, Democratic Republic of Congo, Benin, Ghana, Republic of Guinea, Burkina Faso, Niger, South Sudan, Sudan, The Gambia, Guinea-Bissau, Ethiopia and Cape Verde.

The following institutions participated in the teacher education program of the Multinational Project I: University of Nairobi – Kenya, Kyambogo University – Uganda, Open University of Tanzania, University of Zambia, University of Zimbabwe – Zimbabwe, Jimma University – Ethiopia, Amoud University - Somalia; Université Cheikh Anta Diop (UCAD)-Senegal, Université d' Antananarivo – Madagascar, Universidade Pedagogica – Mozambique, East African University - Somalia, and University of Hargeisa - Somalia

The following institutions participated in the teacher education program of the Multinational Project II: University of Juba (UOJ) - South Sudan, University of The Gambia (UTG), University of Port Harcourt (UNIPORT) – Nigeria, Open University of Sudan (OUS) – Sudan, University of Education Winneba (UEW) – Ghana, University of Cape Verde (UniCV) – Cape Verde, Institut des Sciences (IDS) – Burkina Faso, Ecole Normale Supérieure (ENSUP) - Mali, Université Abdou Moumouni (UAM) - Niger, Institut Supérieur Pédagogique de la Gombe (ISPG) – Democratic Republic of Congo and Escola Normal Superior Tchicote – Guinea Bissau

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Production Credits

This second edition is the result of the revision of the first edition of this module. The informations provided below, at the exception of the name of the author of the first edition, refer to the second edition.

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I. Managing school's educational resources



II. Prerequisites / Required Knowledge

Before you can begin this module on planning and administration, you need to have understanding and knowledge of the following:

Knowledge of education policies and their implications for education management

Knowledge of the structure, organization and functioning of a school

Knowledge of management functions: planning, organization, staffing, supervision, leadership and motivation.

III. Times

120 Hours

This module is divided into four learning units with the following durations:

The school system: Organizational Chart and explanation of terms
20 hours

The role of the School Principal 40 hours

Managing school's human resources 30 hours

Managing school financial and material resources 30 hours

IV. Materials and equipment

The following materials are required:



I. Managing school's educational resources

Description	Unit 1	Unit 2	Unit 3	Unit 4
Microcomputer	**	**	**	**
Printers, scanner, USB drive	*	*	*	*
Internet connection			**	**
Free data sources on school management	***	***	***	***
Free data sources on managing school's educational resources	***	***	***	***
Free data sources on managing a school system	***	***	***	***
Free data sources on managing the human, material and financial resources of a school system	***	***	***	***

** required

** recommended Useful

V. Rationale of the module



Your career as a teacher usually unfolds within a school. You generally teach, but you may occupy other positions of responsibility as well. In any case, you will have to rely on the support of the school's available and potential resources. This module is designed you acquire the knowledge and skills you will need to identify the various resources, understand their functions and roles, use them wisely, and manage them effectively.

VI. Content

6.1. Overview



Apart from teaching, as a teacher you can also assume other positions of responsibility: Principal, Headmaster, Headmistress, Vice Principal, and so on. Each actor has a specific role in the school system, but all activities within the school system are interrelated. This module answers the following questions:

- What are the different components of a school system, and how do they interrelate functionally and structurally?
- What is the concept of the Principal's role and how is it exercised?
- How can you create a school climate that nurtures human and intellectual development and prevent failures?
- How can you manage relationships between the various school actors?
- How can you manage, use and develop school resources?
- How can the school's human resources manage the available resources for which they are responsible?

6.2 Outline

Below is the outline of the module:

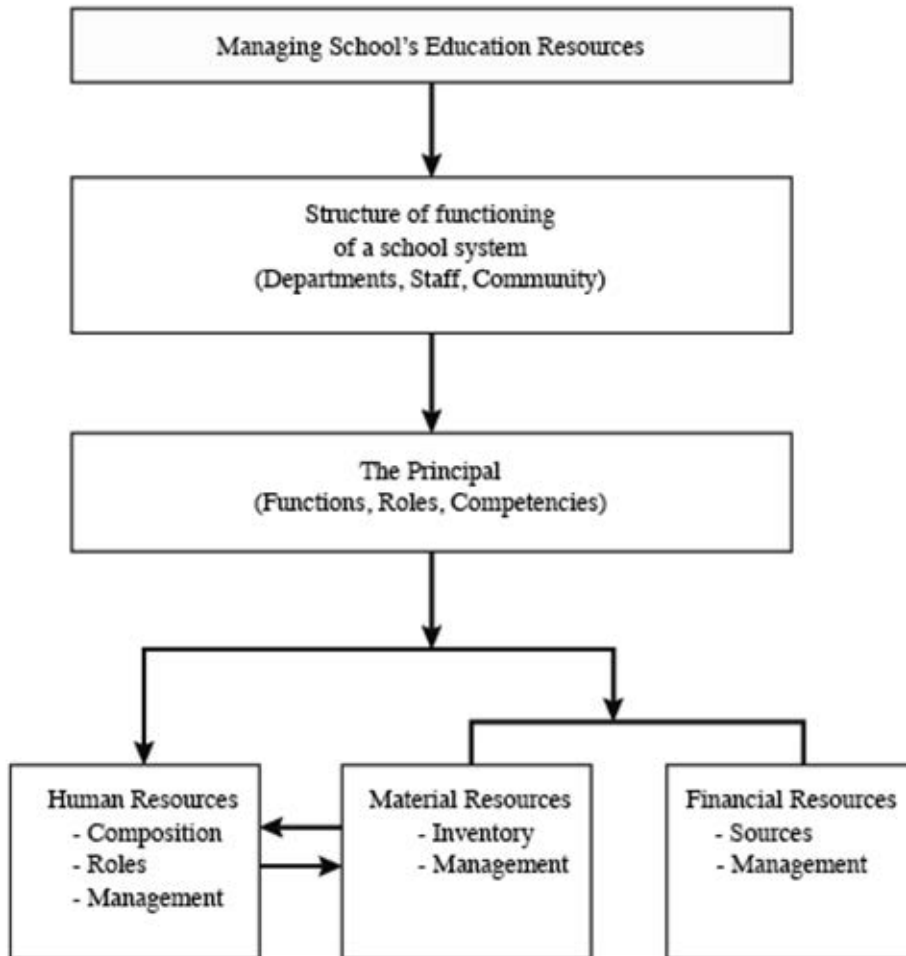
- The school system: Organizational Charts and explanation of terms.
- The role of the Principal: the leadership function and the bureaucratic system.
- The school's human resources: responsibilities, areas of authority and management (management of training and school programs: structure, programs, forming classes and groups; teachers' areas of authority, time management, creating school projects).
- The school's financial and material resources: management, production, development (budgeting and accounting, infrastructures, equipment) équipements pédagogiques).

6.3 Graphic Chart

The chart below shows the organizational presentation of how school resources are managed.

After completing the unit on the Principal's role, two study path options are available (black and green path):

Graphic Chart



VII. General objectives



By the end of the module, you should be able to

- Explain how a school is organized and functions
- Manage a school's teaching, material, financial and human resources
- Lead and inspire a team to achieve harmonious school development
- Integrate successfully the internal and external school communities

VIII. Specific learning objectives

Unit	Learning objectives
1. The school system: Organization charts and explanation of terms	- Identify the actors within a school
	- Become familiar with specific and recurrent terms
	- Clarify concepts
2. The role of the School Principal	Define the competencies and authorities (administrative, technical and pedagogical) of the head of a school community
3. Managing a school's human resources	- Define the tasks of the various human resources in a school system
	- Define the functional interrelations between the various actors (who manages who and what)
	- Define the activities involved in managing human resources
4. Managing a school's financial and material resources	- Identify the various types of financial and material resources available to schools
	- explain how they can be used wisely
	- Managed effectively
	- Maintained appropriately
Objectives are not SMART	

IX. Teaching and Learning Activities

9.1. Pre- assessment

Title of pre-assessment: Your perceptions of the functioning of a school, the School Principal and other school actors

9.2. Rationale

It is important for you to be aware of your perceptions about the functions that they will likely fulfill so that they can correct and clarify them.

Questions

Check the correct answers.

1. Who is not part of the school's internal human resources?
 - A. Students
 - B. Headmaster/Headmistress
 - C. Teachers
 - D. Invigilators
 - H. Groundskeepers
2. Which of the following is included in the school's material resources?
 - A. Sports fields
 - B. Registration fees
 - C. State funding
3. What contributes to a public school's financial resources?
 - A. Laboratories
 - B. Desks and chairs
 - C. Funding by partner organizations
4. Which of the following activities do not fall specifically under the responsibility of the School Principal?
 - A. Overseeing school administration
 - B. Overseeing the school's teaching activities
 - C. Establishing relations with parents
 - D. Implementing rules
 - E. Establishing relations with partners

G. Invigilating examinations

Of the following activities, which one is specifically your responsibility?

- A. Sanctioning late students
- B. Providing feedback on students' performance during class discussions
- C. Planning annual class schedules

5. Which of the following activities are managed by you?

- A. Use of the blackboard, chalk and erasers
- B. Purchasing teaching manuals and materials
- C. Lab room schedules

Which resource is not managed by a public School Principal?

- A. Teachers' salaries
- B. State funding
- C. Documentation and Information Centre

6. What is the ideal way to acquire the ability to manage human resources?

- A. Through experience
- B. Through training in human resources management
- C. Through a combination of training and experience

What is the best definition of human resources management?

- A. Setting up security systems throughout the institution
- B. Arranging ongoing training programs and learning cycles for teachers
- C. Making available to teachers good quality teaching materials in sufficient quantities

7. Who participates in managing a school's material resources?

- A. The students' parents
- B. Student delegates
- C. The Vice Principal
- D. The teachers' union

8. Which activity is involved in managing teaching resources?

- A. Increasing the number of teaching materials in response to teachers' expressed needs
- B. Preparing work schedules
- C. Arranging cultural events to raise funds for the school

Answer Key

- 1. A
- 2. A
- 3. C
- 4. G
- 5. B
- 6. A
- 7. A
- 8. C
- 9. B
- 10. C
- 11. A

Pedagogical comment for learners (100–200 words)

These questions are designed to reveal your current perceptions of how a school functions. The idea is to find out if your knowledge on this subject is accurate, hazy, or nonexistent.

Give yourself 1 point for each correct answer and add up your score. Your percentage of correct answers gives you an idea of how much you know on this subject. You are therefore strongly advised not to look at the answers until you have completed all the questions.

If you scored between 0% and 30%, your knowledge of the basic principles required to complete this module is lacking. You will have to work hard to complete the learning activities.

If you scored between 30% and 80%, you have some ideas about how a school system functions and the responsibilities of the various actors, but these ideas are unclear and incomplete. By completing the activities in this module, you will be able to clarify your ideas.

If you answered more than 80% correctly, you are reasonably well equipped to successfully complete the learning activities below.

Activity 1

Title of the learning activity

Understanding the terms and concepts concerning the structure, organization and functioning of a school system

Estimated time for the learning activity

30 hours

Specific objectives

By At the end of this activity, you should be able to identify the actors and resources in a school system, define their interrelations (organization charts), be familiar with specific and recurrent terms, and clearly understand the relevant concepts.

Summary

The learning strategy is to draw on your previous perceptions of the structure and functioning of a school system, and subsequently to help you clarify these concepts by reading the required texts and completing the exercises.

You are therefore required to identify the different components and resources (human, material and financial) of the school system and classify them into their corresponding subsets and categories. You must define specific roles and their interrelations, based first on the required reading, particularly the two organization charts, and second on a field survey in which the Vice Principal (or Assistant Headmistress/Headmaster) is interviewed.

Purpose of the activity

Before attempting to analyze a system, you must define its scope and fully understand the meaning of the terms and concepts used. This activity is designed to help you grasp these two points. In addition, you may have certain prior perceptions of the school system, based on your experiences as former pupil. The strategy is designed to build on this prior knowledge.

Key words

**School System, Educational Resources,
Management, Resource Management**

Required reading

The texts that you must read are presented in Appendices 1.0 and 1.1. References and abstracts are provided in section 12.

Appendix 1.0. The School System: Organization and functioning [translated] Razafimbelo, J. (2008). Le système scolaire: organisation – fonctionnement.

Appendix 1.1. Explanation of terms and concepts [translated]

Razafimbelo, J. (2008). Termes et concepts. Université d'Antananarivo. Madagascar. Original course.

Appendix 1.2. Management

<http://en.wikipedia.org/wiki/Management>, consulted February 5, 2008

Appendix 3.1. Managing a school's financial resources [translated]

Appendix 3.3. Managing a school's material resources [translated]

Detailed description of the activity

Steps 1 (3 h): Read all of Appendix 1.0 and Appendix 1.1.

Step 2: Complete exercises 1 to 4 in order.

Exercise 1 (3 h): In Table 1 below,

In column 1, make a list of all the people that you might meet in a school.

Classify the person into a subset (column 2).

Indicate the person's category in column 3, using IHR for an individual belonging to internal human resources, EHR for an individual belonging to external human resources, and if the individual is an education actor, and not a resource. An example is given below.

Table 1: Classification of a school's human resources

Individual	Subset	Category
Parent of a student	Community	EHR

Exercise 2 (3 h): In Table 2 below,

In the left column of the table, list the people among the school's internal human resources that you think are human resources managers, except for the principal.

Specify the area of concern for each manager, as well as the people they manage. Refer to the definitions of the terms "manage" and "management" in Appendix 1.1. And Appendix 1.2.

An example is given below, using a Vice Principal, but the task list is not exhaustive, and you should include more tasks in your own table.

Activity 1

Table 2 : Managers of a school's IR

IHR managers	Management area and HR managed
Vice Principal	Pedagogical management of teachers;
	Administrative management of non-teaching staff;

Exercise 3(2h):

Read Appendix 3.1. b) In Table 3 below,

In column 1 of Table 3, make an inventory of what you think are the school's "material resources."

Classify them under either "building inventory" or "equipment" (column 2).

Indicate, in your opinion, who directly manages them (column 3).

Table 3: List of material resources for a school and who manages them

Description of material resources	Type	Manager
Textbooks	Equipment	Librarian

Exercise 4 (2h):

Read Appendix 3.3.

Make a list of potential funding sources for a school, in your opinion.

Step 3: Field survey

The Principal (or Headmistress/Headmaster) holds primary responsibility for a school. He or she has a global vision of the school's functioning, but given the scope of this position, the Principal is usually assisted by a Vice Principal (or Assistant Headmistress/Headmaster).

Exercise 5 (10 h)

Find a school (preferably one located near you to avoid transportation problems). Make an appointment with the Vice Principal (or Assistant Headmistress/Headmaster) and explain the purpose of your request for an interview: to learn about the school's organizational chart and identify the school's human, material and financial resources.

Arrive at the agreed time, and bring 4 sheets: 1) tables 1, 2 and 3, which you have previously filled out, but leaving spaces for the survey answers, and 2) a list of potential financial resources based on your answers to

Conduct your interview, giving your interviewee opportunities to inform you about the organizational chart and provide you with an inventory of the school's human, material and financial resources. Check off the corresponding answers and add what is missing from your files. Ask questions about aspects contained in your files that were not mentioned by the interviewee.

Analyze your results and draw a conclusion (50 to 70 words) about the reasons for any similarities or discrepancies that you observe.

Step 4: Exercise 6

Exercise 6 (3 h): According to the school rules, library books cannot be taken out of the reading room. The teacher sees a student using a textbook with a library stamp in class. The teacher sends the student to the Vice Principal, who, in front of the student, phones the librarian and calls the librarian "incompetent." Answer the following questions:

Why did the teacher send the student to the Vice Principal? (10 to 15 words)

Why did the Vice Principal call the librarian? (10 to 15 words)

Was the Vice Principal correct in terming this a matter of incompetency? Justify your answer using arguments from the reading on the meaning of competency. What is your opinion of the Vice Principal's attitude? (100 to 150 words)

Answer key

(Self-assessment and analysis of instructor's corrections: 4 h)

Step 2

Exercise 1: Six subsets are defined under the heading "2. Structure" in Appendix

1.0.: management staff, administrative staff, teaching staff, students, service staff, and community. The students are merely actors (A), and not human resources. People belonging to the subset "community" are external human resources (EHR). The remainder (the 4 other subsets) are internal human resources (IHR).

Exercise 2: Choose among the IHR the four subsets and which people belong to each department (unit). In general, there is always a department head, and the number of individuals in that department (secretary, technician, monitor, cleaning person, custodian, etc.) depends on the size of the school. For instance, look at the units presented in the example of an organization chart for the Antananarivo lycée (high school). There could be a maximum of 6 assistant human resources managers (Vice Principal, general supervisor, director of education, general affairs manager, librarian or documentarian, technical services manager, chief accountant).

Exercise 3: Refer to Appendix 3.3., then complete the list and the categories. For the managers of these resources, re-read the sections on services and units in Appendix 1.1.

Exercise 4: Refer to Appendix 3.1. then complete the exercise.

Step 3

Exercise 5: The similarities and discrepancies can be explained by the size of the school (number of students, teacher–student ratio), location (capital city, provincial town, region), prevailing socioeconomic conditions (availability of electricity, telecommunications network), and outreach capability (presence and active involvement of partners).

Step 4

Exercise 6:

- a) Because the Vice Principal is the manager of teaching resources.
- b) Because the Vice Principal has delegated authority to the Librarian, who therefore becomes a direct manager.
- c) The Librarian has not properly fulfilled the task: not allowing books to leave the reading room. This is a competency issue because:

It involves both knowledge (of the Librarian's role and authority) and know-how (how to organize the lending system) as well as "soft skills" (e.g., initiative, credibility, problem solving, emotional intelligence).

It is manifest in the observable results: in this case, the textbook was found in the student's possession outside the library's reading room. It is associated with accomplishing activities in actual situations: the actual situation of a student using a manual in a classroom.

Nevertheless, the Vice Principal's attitude as a human resources manager is questionable, because the human dimension was ignored when the Librarian was rebuked in the student's presence.

Pedagogical comments for the learner

This first activity introduces the scope of the module, and will be related to, reinforced by, and further investigated in the activities that follow. By reflecting on the required readings, you should be able to do the activity and complete at least 90% of the answers. You can do your own self-assessment.

- For the first 4 exercises, identify the information that is missing from your initial sheets compared to what you obtained from the Vice Principal (or Assistant Headmistress/ Headmaster). Check to see whether any information from your readings is missing. If so, you have not fully assimilated the lesson. Calculate your mark as a percentage of the results found.
- For the analysis and comments required for exercises 5 and 6, send your answers to the instructor as an email attachment. If you are in a location without an Internet connection, the training organizer will be responsible for sending it.

Activity 2

Title of the learning activity

Determination of the Management Function using the Interview

Learning time

40 hours

Specific objectives

This activity is designed to expand your knowledge of the expected competencies of a team leader in a school and the various authorities (administrative, technical and pedagogical) involved.

Summary

You will begin with the required readings and then prepare a description of what the principal's functions should comprise, considering the 5 associated principles: technical, human, pedagogical, symbolic and cultural. Next, you will prepare a plan for the interview to be held with the selected Vice Principal. You will compare the results of the interview with the previously prepared description, and then write an opinion report on the feasibility and realism of the Principal's authority, as described in the literature.

Purpose of the activity

Although the Principal has the authority to delegate certain powers, she or he nevertheless retains primary responsibility for the school, and the literature abundantly supports this position. It is therefore essential to appreciate the various aspects of the Principal's role by combining all the information in the required readings. Nevertheless, in reality, can a Principal fulfil all the requirements of the role? The field survey is designed to give you a realistic picture of what is actually possible and feasible.

Key words

Principal, leader, administrator, manager, governance

Required reading

Appendix 2: The Role of the School Principal [translated]

Razafimbelo, J. (2008). La fonction d'un chef d'établissement. Université d'Anta- nanarivo. Madagascar. Original course.

Detailed description of the activity

Step 1 (3 h): First, to introduce the concept, answer the three questions below, which are designed to make you aware of your perceptions about a School Prin- cipal:

What does the expression "School Principal" means to you? (5 to 8 words or expressions)

State three qualities that you feel are essential for a School Principal.

In your opinion, what are the main roles that a School Principal should play? (70 to 100 words)

Step 2 (5 h)

Read the document on "The Role of the Principal."

Step 3

To effectively manage a school, the School Principal must possess two areas of knowledge: knowledge of the school and its community, and knowledge of the practical aspects of school management. Based on your acquired knowledge and experience as well as your required readings, complete the two following exercises:

Exercise 1 (6 h): Below are some elements of a training program for School Prin- cipals in a European Union country. Propose the content for these course titles (250 to 300 words per course).

Objective: Assist individuals in charge to assume their new responsibilities and play a key role in managing their school within a framework of central directives, and to implement development processes proposed by the state's Ministry of Education.

Content

Course I: Reflection on the management function; school organization and ad- ministration; school rules

Course II: Arranging conferences; staff supervision (management functions, managerial styles and principles, management strategy); communication skills; other themes: teamwork, school programs, etc.

Course III: Staff supervision (conflict management); school improvement and quality (school projects, school profile, identity, etc.); environmental concerns

Course IV: The Representation function; working with parents; managing repla- cement staff; teaching foreign students

Method: Seminars, classroom courses, teamwork, leadership techniques, role plays, simulations,

activity-based learning, reflection periods, tours (innovative schools and foreign school systems)

Exercise 2 (6 h): Two references (A and B) are provided below concerning the activities and competencies required for school management in an English and French school system, respectively.

- a) What is the difference between these two approaches? (250 words)
- b) Based on the required reading and references A and B, identify the main roles of the Principal and associate two or three competencies with each role.

Reference A: National standards for Headmasters, Great Britain and Wales (2004)

The competencies are grouped into six areas:

The competencies are grouped into six areas:

Build the future

Develop a strategy plan, describe a coherent vision and communicate it with conviction

Inspire, stimulate, motivate and empower others to perpetuate this vision

Transform the school's values and vision

Lead the learning process

Embody a determination to improve learning processes

Master the principles and practice of teaching and learning

Obtain, analyze and interpret information

Initiate and support research and debate on effective pedagogical practices and design strategies to improve performance

Recognize excellence and combat poor results throughout the school

Continuously develop, and work within a team

Encourage a culture of openness and fairness and manage conflicts

Support individuals and groups and enable their personal growth and autonomy

Work collaboratively and build networks within and outside of the school

Stimulate, influence and motivate others to achieve lofty goals

Evaluate and accept evaluations, and take action to improve personal performance

Accept support from others, particularly colleagues, elected representatives and education authorities

Manage the school

Establish and maintain appropriate structures and systems

Activity 2

Ensure efficient day-to-day management of the school

Delegate management tasks and follow-up on their implementation

Set priorities, plan and organize own and others' activities

Use information to clarify decisions on pedagogical, management and organizational matters

Be imaginative in anticipating and resolving problems

Be accountable for school results

Embrace policy directions and anticipate trends

Ensure that the school's education community performs a systematic and rigorous self-evaluation of their work

Gather and use a diversified body of data in order to analyze the school's strengths and weaknesses

Compile the results of internal and external evaluations to ensure the school's development

Reinforce the school's integration into the community

Recognize and harness the richness and diversity of the school's social environment

Engage in dialogue to build partnerships and consensus based on shared values, beliefs and a sense of responsibility

Attend to and take into account the reactions of surrounding communities

Establish and nurture relations with parents and school partners in order to improve the education of all students

Reference B: National reference of activities and competencies for management staff,

- Know how to manage the school
- Know the overall organization of the State, the national education system and the school
- Know how to identify and recognize the hierarchy of standards (political and administrative)
- Know the scope of authority of the principal and each of the usual education actors
- Know the legal and administrative fundamentals of the school's functioning
- Its budgetary and financial rules
- Know how to appraise the conditions for exercising responsibility
- Know how to build consensus on the school's pedagogical and education policies
- Know how to build these policies (proposals) based on knowledge of:
 - the learning modes of children and adolescents
 - the behaviors of youth and adults

- the learning paths of students, their strengths and potentialities, and their difficulties
- teaching programs, teaching materials(or)knowledge repositories
- the relevant overall objectives
- Through dialogue with the education system (President, School Inspector, Technical Consultants) be able to establish the necessary links between national and academic policies and those of the particular school
- Know how to spur, animate and lead pedagogical and educational poli- cies

To manage and develop the school's human resources, know how to:

- Manage staff according to a system of rules and ethics
- Identify the strengths and difficulties of staff
- Value, encourage and help
- Assess work methods and personal commitment

To motivate individuals to engage in teamwork, know how to:

- Analyze, synthesize and formalize elements of a policy or project
- Create conditions that foster teamwork (particularly in the management team), provide leadership and be involved
- Draw on expertise, delegate (set goals and demand accountability)
- Make decisions

To head a program, know how to:

Set objectives

- Analyze the situation, measure and analyze shortcomings
- Develop and implement strategies
- Regulate (review problems to render them solvable), assess
- Measure outcomes, be accountable
- Use, appropriately and in relation to the program, simple statistical tools

To communicate, know how to:

- Organize consensus and information sharing
- Explain policies
- Validate the actions, accomplishments and results of teams and individuals
- Communicate in times of crisis
- Establish the conditions for collective work, and facilitate and develop it

Activity 2

Step 3 (12 h): Field survey with a School Principal

Preparing the survey: Report and classify in Column 1 in Table 4 the responses concerning the roles and competencies of a School Principal from part of Exercise 2 above. This will be used as the interview plan.

Table 4: The roles and competencies of a School Principal

Main roles and competencies of a School, Actual roles and competencies in the school

Principal (based on your reading, knowledge visited and experience), classified

Make an appointment with the Principal (or Headmistress/Headmaster) of a school of your choice, but in a school other than that used for the first activity, and explain the purpose of your survey: to gather information on the functions of a school principal.

Arrive with your Table 4, which you will use as a semi-directed interview plan, at the agreed date and time and take notes on blank paper. Conduct a semi-directed interview in which you guide the discussion but allow your interviewee to speak freely on each subject. You will talk about training, roles, competencies and activities.

Place particular focus on aspects of managing human, material and financial resources. You will need this information for the third activity.

Step 4 (6 h): Using the results

From your interview notes, complete Column 2 in your table by listing the roles and competencies of the Principal (or Headmistress/Headmaster) that you identified during the survey, using the same classification system.

Write a report, including

a brief description of your survey: objectives, preparation, conduct and results (150 words)

Your conclusion concerning any discrepancies or similarities between what you read in the literature and the actual roles and competencies of the Principal that you interviewed (150 words).

Answer key

Step 1:

Supervisor, manager, leader, administrator, power, authority, overseer, motivator, respect, representative of authority, person in charge

Knowledgeable, responsible, sociable, resolute, nurturing, good administrator

Materials management, administrative management, pedagogical management, financial management, leadership, external relations

Step 2

Exercise 1

Course 1

Course 2

Course 3

Course 4

Exercise 2

The difference between the two approaches:

Francophone: activities followed by competencies to carry out the activities

Anglophone: competencies followed by activities

Main roles (7): administer; manage (human, material and financial resources); lead/motivate/mobilize; develop/innovate the vision; representation / external relations; supervision/oversight/assessment; communication / attentiveness

Associate 2 or 3 possible competencies with each role.

Step 4

Survey description: interview transcription and identification of what applies to the 7 roles specified in exercise 2.b). Provide the name of the school and describe the Principal (or Headmistress/Headmasters) (but do not give his/her name).

Conclusion: Note the difference between theory and reality, and list any discrepancies.

Pedagogical comment for the learner

This fourth activity will develop your ability to analyze and synthesize, and will enable you to better understand the roles and competencies of the School Principal. You will send in your answers to steps 2, 3 and 4.

Activity 3

Title of the learning activity:

- Identification, using a field survey, of the human, material and financial resources of a school as well as the tasks of the different actors and their functional interrelations.
- Learning time: 30 hours
- Specific objectives: This activity is designed to develop your knowledge of the different types of school resources, the functions and roles of these resources, and the activities involved in managing human, material and financial resources.

Summary

This activity consists of retrieving the sheets developed in the first activity (tables 1, 2 and 3 and exercise 4) and Table 4 from activity 2, then conducting a field survey at a school located near you (other than the school used in activity 1 so as not to interview the same Principal/Headmistress/Headmaster) in order to learn about realities in the field. You can then make a comparative analysis between the conceptions learned from the literature and the field data, and identify similarities and discrepancies between theoretical and actual situations. Second, it involves recognizing the activities involved in managing a school and proposing management methods designed to achieve optimal performance.

Purpose of the activity

This activity builds on your knowledge and experience, using another approach to achieve the same objectives as the first activity: a direct, real-life approach based on a survey.

Key words

**Management, Planning, Motivation, Supervision,
Monitoring, Budgeting, and Resource allocation**

Required reading

Appendix 3.0. Managing a School's Human Resources [translated]

Razafimbelo, J. (2008). Gestion des ressources humaines d'un établissement scolaire. Université d'Antananarivo. Madagascar. Original course.

Appendix 3.1. Managing a School's financial resources [translated]

Razafimbelo, J. (2008). Gestion des ressources financières en milieu scolaire. Université d'Antananarivo. Madagascar. Original course.

Appendix 3.2. Basic accounting notions [translated]

Razafimbelo, J. (2008). *Eléments de comptabilité générale*. Université d'Antananarivo. Madagascar. Original course.

Appendix 3.3. Managing a school's material resources [translated]

Razafimbelo, J. (2008). *Gestion des ressources matérielles d'un établissement scolaire*. Université d'Antananarivo. Madagascar. Original course.

Appendix 3.4.: Evaluating education costs [translated] Évaluer les couts de l'éducation

http://www.adeanet.org/newsletter/Vol10No1/fr_7.html

Appendix 3.5.: THE IFLA/UNESCO SCHOOL LIBRARY GUIDELINES

<http://archive.ifla.org/VII/s11/pubs/sguide02.pdf>

Detailed description of the activity

Step 1 (1 h): Re-read tables 1, 2 and 3 that you developed in Activity 1, in which you identified all the potential resources in a school based on your readings and previous knowledge.

Step 2: The school Principal/Headmistress/Headmaster is not the only manager at the school. Some tasks may be delegated, although the Principal has final responsibility.

Exercise 1 (4 h):

Read the document in Appendix 3.0., then Appendix 3.5.

An individual becomes a human resources manager as soon as more than one individual reports to that individual. Select two human resource managers other than the Principal (or Headmistress/Headmaster).

Based on your reading, identify the required competencies for a human resources manager, the management activities that this person must perform, and the manner in which they should be performed to ensure sound staff oversight and optimal performance. Write your results in Table 5 below.

An example concerning the monitoring supervisor is given in the first line, but not all possible activities have been listed.

Table 5: Management activities and methods for a manager of a school's human resources

Human Resources Manager	Management activities (based on your previous knowledge and the readings)	Methods
Manager 1: Monitoring Supervisor	Planning individual monitoring schedules	Asking each monitor for their desired schedule

Activity 3

Exercise 2 (4h)

Read the documents in Appendix 3.3 and 3.5.

Select two material resources managers.

From your readings, identify the required competencies for a material resources manager, the management activities that must be performed, and the manner in which they should be performed to ensure sound staff management and optimal performance. Write your results in Table 6 below.

An example concerning the Librarian is given in the first line, but not all possible activities have been listed.

Table 6: Management activities and methods for a manager of a school's material resources

Material Resources Manager	Management activities (based on your previous knowledge and the readings)	Methods
Manager 1: Librarian	Participates in drawing up the library budget	Asks each staff member for their input

Exercise 3 (4h) :

Read the documents in appendices 3.1., 3.2., 3.4. and 3.5.

Select a Financial Resources Manager other than the Principal (or Head- mistress/Headmaster).

From your readings, identify the required competencies for a financial resources manager, the management activities that should be performed, and the manner in which they should be performed to ensure sound staff management and optimal performance. Write your results in Table7 below.

An example concerning the bursar is given in the first line, but not all possible activities have been listed.

Table 7: Management activities and methods for a manager of a school's financial resources

Financial Resources Manager	Management activities (based on your previous knowledge and the readings)	Methods
Bursar	Draws up the school budget	Asks each department (unit) head to prepare a needs list

Step 3(2hrs)

Preparing the survey

Find a school other than the one where you conducted your first field survey so that you can gather as many examples as possible and so as not to re-interview the same individual twice.

Make an appointment at the school and explain the purpose of your survey. The School Principal will give you the name of an appropriate individual to interview.

Step 4 (8 h): Conducting the survey

Arrive at the agreed date and time, and bring along tables 5, 6 and 7 to use as an interview plan, as well as blank notepaper.

In tables 5, 6 and 7, report the results obtained from the interview on managing human, material and financial resources.

Compare the results between the interviews and those in your tables 5, 6 and 7 based on the literature (200 words).

Step 5 (4 h): Using the results

In tables 5, 6 and 7, report the results obtained from the interview on managing human, material and financial resources.

Compare the results between the interviews and those in your tables 5, 6 and 7 based on the literature (200 words).

Write a report, including

A brief description of your field survey: objectives, preparation, conduct and results (150 words).

Your own conclusion(150 words). Also, compare the results of your interview with those obtained in the interview with the Principal in Activity 1.

Answer key

Although the resources are different, their tasks are similar: planning, organizing, and directing/guiding/supervising/motivating and monitoring. The third action, directing/guiding/supervising/motivating, is appropriate for a Human Resources Manager. By understanding these actions for each resource type, you will deepen your overall understanding of them.

Exercise 1: Potential human resources managers, depending on the size of the school: Vice Principal (or Assistant Headmistress/Headmaster), Monitor, Supervisor, and the various department heads: academic, general affairs etc.

Exercise 2: Potential Materials Resource Managers: Vice Principal (or Assistant Headmistress/Headmaster), Librarian, head of the general affairs department, laboratory supervisor. For their management activities, add "maintain in good condition, develop or improve them."

Exercise 3: Potential financial resource managers: Bursar or Accountant.

Pedagogical comment for the learner

In step 3, the survey results enabled you to perform a self-assessment in your knowledge of management methods, so that you can compare your written list with what actually occurs in practice. If your descriptions of the tasks and methods are about 80% in agreement with the interview results, you are imaginative and you already possess many of the desired competencies.

Activity 4

Title of the learning activity

Developing a school project

Learning time

30 hours

Specific objectives

This activity is designed to achieve all the specific objectives of the module and to draw on all your knowledge and competencies after completing the previous activities.

Summary

First, you must do the required reading, and then present an educational project in which all the required resources are taken into account. You will then present the roles of each school actor involved in the project, focusing on human, material and financial resource managers.

Purpose of the activity

This activity is designed for you to acquire a general overview of the module.

Key words

School project, Education project, Collaborative work

Appendix4. Example of an education project

Detailed description of the activity

Step 1 (4 h):

Read in Appendix 1.1, the "School Project."

Read in Appendix 2, "The School Project"

Read Appendix 4, "Example of a School Project."

Step 2 (10 h): Identify the students who are going to work with you.

Find out from the course organizer the addresses of the other students in your course who are working on the same module.

Identify students who appear to be accessible (geographically or online) and send them a letter or an email. State your name and your coordinates, and ask them if they would like to work

Activity 4

with you on Activity 4 of this module.

Select 3 students who have agreed to collaborate with you and discuss how you would like to work together (regular meetings on dates when you are mutually available, regular email messages with attached files, forum, chat room, etc.). If you cannot agree on the terms for a physical meeting, reduce the number of your group members to just 2.

Step 3 (15 h): Collective Project Development

Define the scope and theme of your education project. If face-to-face meetings are impossible and you have to use mail or email, each member should propose a project and the group should reach a consensus decision. This should be decided after two email or mail messages each.*

Define the project objectives, describe the activities, and for each case, specify management aspects and identify the required actors (human resources), material resources, and financial resources.

Write a collaborative report (300 words) describing your project, how it will be implemented, and the functions of each resource manager (individual school actors involved in the project).

Attach your project as an appendix to your email (1000–1200 words).

If you cannot connect to the Internet or use another collaboration platform, you can use a telephone forum or chat line.

Answer key

Base on the example describing the different aspects of a project: administrative aspect, pedagogical aspect, technical aspect, material aspect, and financial aspect (budget, funding).

Comment for the learner

You will send in your final report as an email attachment.

List of key concepts (Glossary)

ACTOR: Generally, any individual who acts or intervenes in the school's functioning.

ALLOWANCE: A valuation account or provision for depreciation of an item, a risk, or a bad debt that reflects a reasonable estimate of what will ultimately not be collected.

AMORTIZATION: The total charge to date of the periodic depreciation of a fixed asset over its useful life.

ASSETS: All the property and rights of an enterprise that can be used to carry out its activities.

BALANCE SHEET: A formal accounting document of a company in the form of a summary statement showing assets, liabilities, and owners' equity at a particular moment in time.

BOND: A debt security, in which the authorized issuer owes the holders a debt and, depending on the terms of the bond, is obliged to pay interest (the coupon) and/or to repay the principal at a later date, termed maturity. A bond is a formal contract to repay borrowed

money with interest at fixed intervals.

CAPITAL PROPERTY: Essential materials for the school to function, subject to gradual depreciation.

COMPETENCY: Can be broadly defined as the ability of an individual to accomplish certain tasks aptitude, skill.

CULTURAL PRINCIPLE: The creation and advocacy of a school's image or brand.

FUNCTION: The set of activities and roles characteristic of an element of a group, organization or operation.

GENERAL ACCOUNTING SETUP: All the rules designed to standardize the methods for recording accounting operations and presenting accounting documents (income statement and balance sheet).

KNOWLEDGE: All the statements and procedures built and recognized by a community.

LEADER: Broadly defined, the individual who is the most influential or popular, a leader, a central personage.

LEADERSHIP: The principle whereby leaders adopt the changes and improvements required to influence events.

LIABILITIES: The total of the financial obligations of an enterprise, acquired in order to fund its activities.

LIQUIDITY: Cash assets, or the ability of goods to be converted into money.

MANAGEMENT: The art of conducting, leading, administering, governing, and ruling. Certain principles are generally associated with management: planning, organizing, directing, motivating and overseeing.

MOTIVATION: Incitement to act in order to meet a need.

ORGANIZE: Using the required resources optimally to achieve project success.

PLANNING: Defining what should be done in the future to accomplish a plan of action in a certain timeframe (today, tomorrow, in a month, in a year, in five years, whenever).

PRINCIPAL/HEADMISTRESS/HEADMASTER: The person, who directs, heads and represents the school or educational institution.

QUALIFICATION PROCESS: a social process in which individuals are selected from the labor market and hired to fill categorized positions in a hierarchical system, based on various criteria.

RESOURCE: something or someone that supports or helps an action to be carried out.

ROLE: The expected behaviours associated with a given status, including the attitudes and values that the community assigns to an individual and all those who have the same status.

SCHOOL PROJECT: A set of established strategies that guides the school's day-to-day operations.

SHARE: A share into which the capital of a stock company is divided, the owners of which are entitled to receive dividends. Shares are negotiable instruments.

SOCIAL CAPITAL: Represents the active connections between people, including trust, mutual understanding, shared values, and behaviours that bind together the members of groups, networks, and communities and make cooperation possible; comprises the norms and relations embedded in social structures that enable people to coordinate action to achieve desired goals.

STATUS: The position that an individual occupies in a system at a given time.

TASK: A specific piece of work to be accomplished.

Compiled List of Required Reading

Appendix 1.0

Summary: This document briefly describes general notions of a school system, its structure, the units and subsets that comprise it, and how it functions (the roles of each component of the system). Two examples of organization charts are provided: one for a southern school (Madagascar) and one for a northern school (France).

Purpose: By reading this document, you will get a general idea of what constitutes a school system, how to classify the various components, and how to distinguish the roles assigned to each entity.

Summary: This document clarifies the terms and concepts as they are used in this module.

Purpose: Terms sometimes have several meanings, so in order to clearly understand this module, we must learn how these terms are used.

Summary: This document describes the knowledge and skills required for the job of School Principal (or Headmistress/Headmaster). First, it presents the set of knowledge and skills that are appropriate for the school and its community: the Principal's place in the school and in its organization chart, the groups that must be managed, the kinds of thinking and functioning that are required, and finally, strengths and weaknesses. It covers practical aspects of the principal's functioning: inspiring a team of teachers, humanizing the school environment, fostering innovative teaching while adhering to the school's rules and requirements, and creating a culture of assessment. It concludes with some reflections and an invitation to think about how to practice this new job, a genuinely professional profession.

Purpose: In order to change our school systems and school environments, we need a new generation of school leaders and a new conception of the job of School Principal. As a teacher and potential School Principal (or Headmistress/Headmaster), you will find in this document some basic, essential information that will help you understand the mission and tasks that a school leader must accomplish.

Summary: This document presents the four essential components involved in managing a school's human resources: management practices, rules and regulations, the many internal and external actors, and management policies. The different tasks involved in managing human resources are then presented: planning and organizing, supervision and oversight, inspiring,

Purpose: Managing a team is not the sole responsibility of the Principal. According to the school's organization chart, other individuals are in charge of the staff in their departments, as appropriate. Because the associated management activities are similar, it is essential for you to become familiar with the activities described in this document, as later on you will be managing a team as part of your job.

Summary: After presenting potential means and sources of school funding, this document describes commonly used procedures to allocate school resources under a state budget (budgetary rules, budget year, budget structure and budget implementation). It then provides guidelines on how to prepare a school budget by making an inventory, followed by an explanation of budget items (liabilities, assets, etc.).

Purpose: Of course, a budget manager needs specialized training that exceeds the scope of this course, but you as a teacher will be expected to contribute in one way or another to the preparation and management of the departmental budget, and it is important that you have the minimum required knowledge and skills, as presented in this course.

Appendix 3.2

Summary: Definitions of basic accounting concepts are provided, with examples of simple and traditional accounting operations such as purchases, recording items, accounting methods, operating accounts, and accounting documents.

Purpose: This document provides some basic notions so that you can understand and perhaps perform simple operations, and thereby contributing to managing your school's financial resources.

Appendix 3.3

Summary: This document provides an inventory of the material resources that may be found in a school, classified under "building inventory" and "equipment," and describes the associated management activities.

Purpose: As a teacher you will have to use and manage your school's material resources. This article will clarify the tasks that you must master in order to manage the various resources.

Appendix 3.4

<http://archive.ifla.org/VII/s11/pubs/sguide02.pdf>

Summary: A 26-page document that explains aspects to consider in developing and implementing a school library policy, it provides an inventory of the various resources that are used and useful: human, material and financial. The roles and management of each of these roles are then described along with budget preparation, the required qualities and competencies of individual library staff, library programs and activities, and finally, the role of the School Principal.

Purpose: Although it describes a library, this document covers all the aspects addressed in this module, namely the structure, functioning, and role of the Principal and the management of the school's human, financial and material resources. It is an informative document that should be read from beginning to end, as it provides an overview of the module.

Appendix 4

Example of a school project (a high school in French Belgium)

Purpose: This document presents a high school project in three parts: objectives, methods and actions. First, two priority goals are identified. The implementation methods are then defined and described, namely the education team that runs the project, the pedagogy to be used, relational aspects (dialogue, resolve, transparency), pedagogical support (teaching materials, documentation/tutoring centre), and management. Finally, the actions that must be taken are described in terms of scientific, pedagogical, methodological and relational aspects.

Purpose: This document is strongly recommended, as it presents an example of educational school project that gives an accurate picture of the school's mission, with its objectives, methods and actions. It will serve as a guide when you propose your own school project.

Compiled List of Useful Links

Useful link 1

Title: Évaluer les coûts de l'éducation [Evaluating the costs of education]

http://www.adeanet.org/newsletter/Vol10No1/fr_7.html, consulted 30 January 2008

Summary: This document provides information on potential school funding sources, based on the situation in Mali and Madagascar.

Purpose: This will provide some idea of the expenses involved in education and how they apply to a school.



Useful link 2

http://eduscol.education.fr/D0217/grh_actes.htm consulted 09 February 2008. [in French]

Summary: This site provides access to all the published articles arising from a seminar on human resources management.

Purpose: Learners can download the articles that are most relevant for their individual learning needs.

Useful link 3

Title: La GRH: Principe, pratiques et critiques [Human resources management: principle, practices and criticism]

http://eduscol.education.fr/D0217/GRH_actes.pdf consulted 30 January 2008 [in French]

Purpose: This text contains a critical reflection on the underlying practices and principles of the concept of "staff."

Purpose: This reading will expand your knowledge of how the principles and practices of staff management (in other words, human resources management) have changed over the years.



Useful link 4

Title: Management

<http://en.wikipedia.org/wiki/Management> consulted 05 October 2009

Summary: This site explains the term "management" and how the associated concepts have evolved over the years.

Purpose: This reading will expand your knowledge and vocabulary in a variety of areas related to management activities.

Activity 4



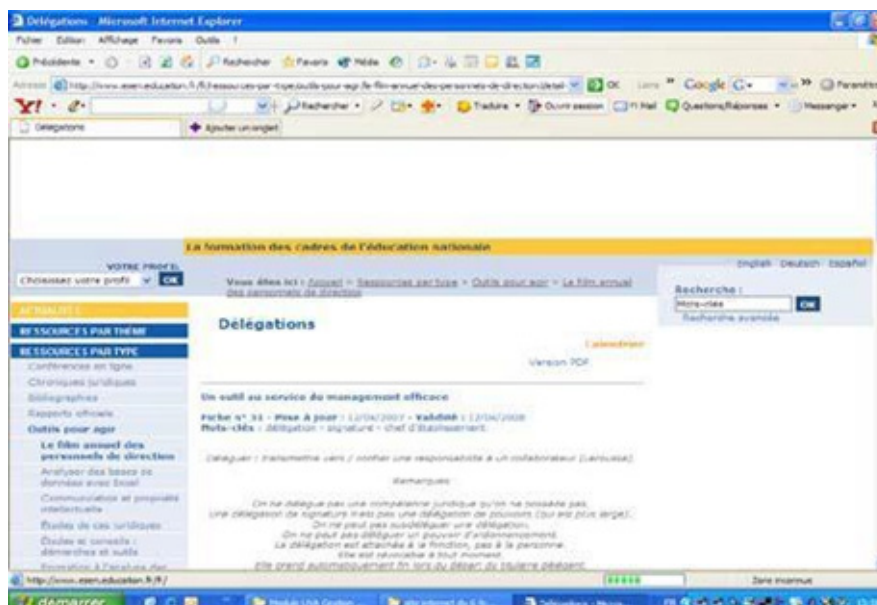
Useful link 5

Title: [Delegation]

<http://www.esen.education.fr/fr/ressources-par-type/outils-pour-agir/le-film-an-nuel-des-personnels-de-direction/detail-d-une-fiche/?a=31&cHash=eafcb08fe8> consulted 09 February 2008 [in French]

Summary: This site provides an explanation of what it means to delegate, what can be delegated, how to delegate, and the responsibilities of the delegate.

Purpose: The School Principal cannot do everything for the school. Principals work in collaboration with others, to whom some authority must be delegated. It is therefore important for a principal to understand what "delegation" means.



Useful link 6

<http://www.ac-orleans-tours.fr/ia41/guideprojetetablissement.pdf> [in French]

Summary: This text describes the essential elements of a school project, including an explanation of the term "project," a description of a school project, development steps, and some operational aids. Two examples are illustrated, with references.

Purpose: This document is recommended for its in-depth information on the school project.

Useful link 7

http://www.acrouen.fr/rue/ruefeclil/pages/projet_etablissement.html#pe1 consulted 09 February 2008 [in French] Education policies in France: from one "milestone Act" to another: Problems of justice and equity (1975–2005), which contains a description of the "school project" under the Jospin Act of July 14, 1989 and the loi d'orientation et de programmation of April 25, 2005, or the Fillon Act.)

Summary: This is a report on discussions and debates on the impact of school projects, 10 years after the act that instituted them in France.

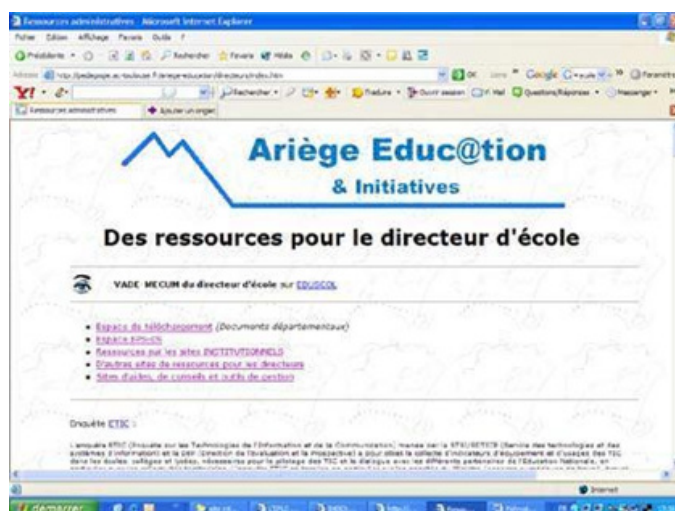
Purpose: The analyses of the debates and the various perspectives shed light on the concept of the school project and invite reflection on proposed directions for the future.

Useful link 8

<http://pedagogie.ac-toulouse.fr/ariege-education/directeurs/index.htm> consulted 09 February 2008 [in French]

Summary: This Web page provides references with links to sites that are relevant for Principals, with useful, downloadable resources for performing the job of Principal: various texts, aids (project development), advice and management tools.

Purpose: All these links have been previously accessed and deemed useful for students who are seeking information and guidance to gain a deeper understanding of the School Principal's job.

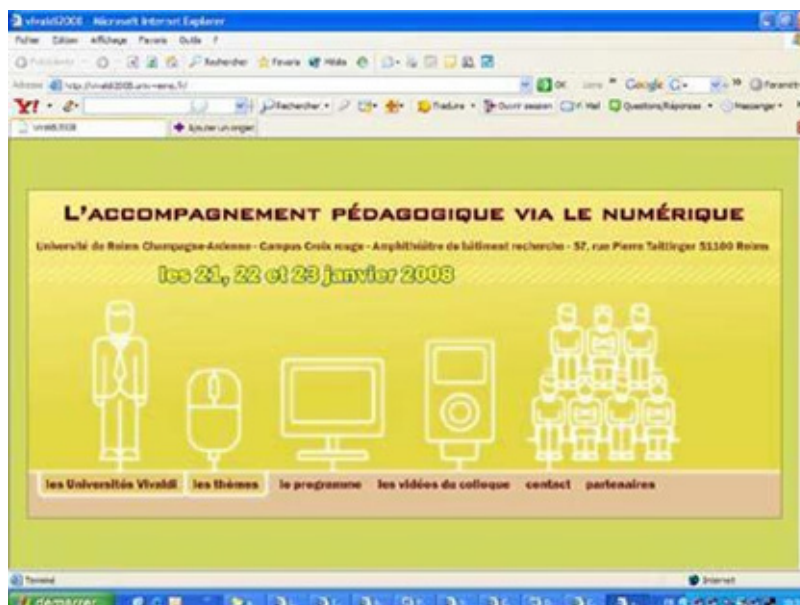


Useful link 9

<http://vivaldi2008.univ-reims.fr/> [in French]

Summary: This site reports on a workshop on the pedagogical use of ICTs.

Purpose: You will use ICTs as part of their training, including forums and chat rooms, to complete the activities of this module, provided you have access to the required tools.



Useful link 10

<http://www.eurydice.org/portal/page/portal/Eurydice/showPresentation?pubid>

=014FR consulted 09 February 2008 [Web page is a general EACEA directory in English]

Summary: This site provides information on funding and resource management in European countries.

Purpose: This site presents an overview of the education visions of developed countries, which you can compare with your own country's vision

Module summary

This module is one part of a three-part course on "Education planning and administration." The focus is on the school, the primary destination of a teacher, and it concerns the functions that a teacher will probably fulfil as a teacher, but also as a school administrator. The classroom teaching function as such is not addressed.

This module is designed to help you acquire the knowledge and skills you will require to manage the available human, material and/or financial resources under your responsibility when performing the job of either "teacher" or "school administrator."

To achieve this objective, you must first identify the school's various resources, understand their roles and functions, and learn how they operate. Second, you will acquire the knowledge and skills required to perform all the functions of a resource manager. Particular emphasis is placed on the role of the School Principal (or Headmistress/Headmaster), given that this position has considerably changed in recent years to account for a number of new dimensions: technical, human, pedagogical, symbolic and cultural.

The learning strategy includes two complementary aspects: an inventory of your conceptions, knowledge and experience and a list of required readings to build on your assumptions; and a field survey to discover the reality on the ground. The readings, surveys, comparative analyses, and a collaborative project are conducted as part of a formative assessment, followed by reflections meant to induce you to evolve your conceptions and appropriate the knowledge and skills targeted in this module.

In short, this module is designed to provide you with the tools and abilities you need to manage a school in a truly professional manner.

Summative assessment

After you have identified the knowledge that this module provides on the different elements that make up a school system and their interrelations, propose a method for managing one of the schools in which you conducted your survey. Focus particularly on managing the school's human, material and financial resources (3,000 words).

Answer key

- Describe the overall organization and functioning (subsets, units and their various roles) of the school (preferably a high school).
- Present the school that you visited (organization chart).
- Describe the roles and required competencies of the school principal, including the main activities involved.
- Discuss the case of the surveyed Principal (or Headmistress/Headmaster). Identify strengths and weaknesses.
- Identify areas where shortcomings are apparent, or where improvements are needed.
- Describe the delegation of authority: the roles and responsibilities of each unit and their competencies, as noted in the surveys.
- Put forward some proposals, taking into account the theories presented in the required reading. Place particular emphasis on the Principal's
- Role. Mention specific details about resource management, including the management of human, material and financial resources.

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