THE INTEGRATION OF STRATEGY FORMULATION AND IMPLEMENTATION IN THE GREATER SEKHUKHUNE DISTRICT DEPARTMENT OF BASIC EDUCATION, LIMPOPO PROVINCE

by

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RESEARCH DISSERTATION

Submitted in fulfillment of the requirements for the degree of

MASTERS OF BUSINESS ADMINISTRATION

In the

FACULTY OF MANAGEMENT AND LAW

at the

UNIVERSITY OF LIMPOPO

SUPERVISOR: Prof. GPJ Pelser

2010

DECLARATION

I declare that the research dissertation hereby submitted to the University of Limpopo, for the degree of Masters of Business Administration has not previously being submitted by me for a degree at this or any other university; that is my work in design and in execution, and that all material contained herein has been duly acknowledged.

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Machabaphala Sello Nelson (Mr.)   **Date**

ABSTRACT

This research report is based on integration of strategy formulation and implementation in the Greater Sekhukhune District Department of Basic Education, Limpopo Province.

The purpose of this research is to investigate the key drivers in the formulation and implementation of strategies and how can they be integrated to achieve the formulated goals and objectives of Greater Sekhukhune District Department of Basic Education.

This report deals only with qualitative research method.

The major findings of the study are that there are key drivers of strategy formulation and key drivers of strategy implementation and their outcomes. The key drivers of strategy formulation are the vision and mission statements, long-term objectives, and generation and selection of grand strategies; whereas the key drivers of strategy implementation are leadership, organizational culture and organizational structure .The integration of these key drivers is essential for the implementation of strategies, leading to improved service delivery to various stakeholders.

The report concludes that in order to approach strategy formulation and strategy implementation in an integrated manner, the following should take place : (1) managers and staff members who are responsible for strategy implementation should also be involved in strategy formulation processes ; (2)organizational culture should be changed to create a conducive environment for the managers and the employees to be motivated to render quality services at service points ; (3) leadership and management to guide vision and mission of the district; (4) organizational structure to 'fit' implementation of strategies for efficiency and effectiveness of the integration of strategy formulation and implementation to achieve formulated goals and objectives.

AKNOWLEDGEMENTS

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CHAPTER 1

INTRODUCTION

1.1. Introduction

Organizations undertake purposeful activity; what they do is not without purpose. Ideally, that purpose will be understood, shared and supported by everyone in the organization such that there is a clear direction for the activities and strategies.

Organizations exist to achieve pre-determined goals and objectives. Strategy is a road map that organizations utilize to achieve these goals. Goals or objectives are "ends" and strategies are "means" to an end. Establishing the purpose and direction is a key role of the strategic leader; and it will provide a basis for the more detailed objectives and performance targets for individual managers and employees. For an organization to realize its goals, the organization should integrate the formulation and implementation of strategies.

This research report will explore the integration of strategy formulation and implementation to achieve the objectives of the organization.

1.2. Background to the Research

The prospective researcher works for the Greater Sekhukhune District Department of Basic Education as Deputy Chief Education Specialist in the Curriculum Section. The observation made by the researcher is that Senior Management through the involvement and participation of the broad membership of the Department at all levels, that is, Head Office (Corporate Level), District Offices (Business Level), and Circuit Offices and Schools (Functional level) develops good strategies and in the process spend substantial amounts of resources. The District Senior Manager acknowledged the challenge of aligning the strategy formulation and implementation of various small business units in the district during his first welcome on the 15th March 2010. The greatest challenge has always been the effective alignment of formulating and implementing such strategies.

The Member of Executive Committee (MEC) for Department of Basic Education, Limpopo, Namane Dickson Masemola (2009:2), in his Budget Speech for the financial year 2009/2010 stated that, 'the January 2008 statement of the ANC and the 2009 elections manifesto pronounced that education must be elevated from being a departmental issue to a societal issue; one that occupies the attention and energy of all people.' Masemola quoted his Excellency President Jacob Zuma, in his state of the nation address when he pronounced that 'Education will be a key priority for the next five years'. The president went on to elaborate on key areas that would become focal areas of the new administration. These areas are 'infrastructure development, early childhood education, improvement of schools management, encouragement of learners to complete their secondary education, elimination of sexual harassment of learners, promotion of lifelong learning, continuous development of employees, promotion of unity and development of shared value system.'

Indeed, Education is a key item on the national agenda of the Reconstruction and Development of our country and it is a core element of social transformation, requirement for the success of the nation, pre-condition for development and a cornerstone for moral development and growth.

The Member of Executive Council, Namane Dickson Masemola, has re-iterated that this national project needs all-round cadres and community activists who inspire, invigorate and mobilize a broad front to ensure quality education, curriculum delivery, effective and efficient management and good governance of our schools. For the key areas elaborated by His Excellency President Jacob Zuma and the demands of the national agenda of the Reconstruction and Development of our country to come to fruition, the Greater Sekhukhune District Department of Basic Education needs the integration of strategy formulation and Implementation.

The provision of an efficient and effective integrated public education system plays a major role in sustaining development in Limpopo Province. The motto of the Limpopo Department of Education is finding solutions to educational challenges through collective engagement and participation until the doors of learning are open to all. Without an integrated education system, there would be a limit to the achievement of the above motto.

1.3. Significance of the Research

The research will be of value for the Greater Sekhukhune District Department of Basic Education in integrating the formulation and implementation of its strategies to achieve formulated goals and objectives. The management will be in a position to evaluate the benefit of an integrative approach to strategy formulation and implementation to achieve the strategic goals and objectives of the department. The results of the research can be brought to fruition by other government and public institutions. This research will provide valuable information in helping such institutions to address the question of integrating the strategy formulation and implementation.

1.4 Problem Statement

The observation is that the Greater Sekhukhune District Department of Basic Education is not able to integrate the formulation and implementation of its strategic goals. People who formulate strategies are different from people who implement them, hence, lack of coordination and integration of strategy formulation and implementation process.

Strategy formulation and implementation as alluded above involves every section or division of the district. There is definitely no role clarification and responsibility allocation among management and other employees of the district. Having noticed the above there is little or no coordination between different business units in the district. Every business unit implements the strategies with no link to the overall goals and objectives of the district. Business units operate in silos. Coordination and integration of strategy formulation and implementation are emphasized only at management meetings held annually.

The problem is that the failure to integrate the strategy formulation and implementation hinders the effective and efficient delivery of quality education for all.

1.5 Aims of the Study

This research report aims to ensure integration of strategies to achieve strategic goals and realization of the overall objectives of working together to provide quality education, improving the quality of life of the people of the Greater Sekhukhune District. The study will strive to highlight the close relationship between strategy formulation and implementation processes. In order to do this the key drivers of strategy formulation and implementation will be identified and aligned.

1.6 Objectives of the study

The study seeks to address the following objectives:

- ➢ To identify the key drivers of strategy formulation and implementation.
- ➢ To investigate how strategy formulation and implementation can be linked.
- ➢ To explore best practices and strategies the Greater Sekhukhune District Department of Basic Education can use to integrate the strategy formulation and implementation after the alignment of strategy formulation and implementation.

1.7 Research Questions

The main research question is why the Greater Sekhukhune District Department of Basic Education fails to integrate the strategy formulation and implementation to achieve its goals and objectives. Other research questions are:-

- ➢ What are the drivers of strategy formulation and implementation?
- ➢ What are the outcomes of the strategy formulation and implementation?
- ➢ How strategy formulation and implementation can be linked?
- ➢ What are the best practices and strategies the district can use after the alignment of strategy formulation and implementation?

Assumption

The researcher makes the following assumptions about the study: Strategy formulation and implementation that is not integrated leads to poor or low service delivery standards.

Delimitation of the study

The Greater Sekhukhune District Department of Basic Education has three levels.
Namely:

- ➢ 1   District Office
- ➢ 33 Circuit Offices
- ➢ 346 Secondary Schools and 585 Primary Schools.

In addition there are 3 Further Education and Training (FET) Colleges and 2 Education Multi Purpose Centre's (EMPCs). The above first two levels provide different services to the schools which is the last level. District Office provides strategic and policy direction to all the last two levels, Circuit Offices and Schools (both Secondary and Primary). The central focus of this study is limited to District and Circuit offices where District Senior Manager, Circuit Managers, Managers, and selected Staff Members carry the responsibility to oversee the formulation and implementation of the coordinated and integrated strategy formulation and implementation. The integration will only address the integration inside and not without. The study will only look at the vision and mission statements, long-term objectives, leadership, cultures, and structures of the organization, not the people and mechanisms.

1.8 Definitions

For the purpose of this research report, the following definitions will apply: -

- **Strategic Management** is defined as the process whereby all the organizational functions and resources are integrated and coordinated to implement formulated strategies which are aligned with environment, in order to achieve the long-term objectives of the organization and therefore gain a competitive advantage through adding value for the stakeholders. Ehlers and Lazenby (2007:2)
- **Strategy** refers to the pattern or plan that integrates an organization's major goals, policies and action sequences into a cohesive whole.
- **Objectives** are defined as specific results that an organization seeks to achieve in pursuing its basic mission.
- **Vision statement** defines what the organization wants to become.

- **Mission statement** is defined as the enduring statements of purpose that distinguish one business from other similar firms.
- **Budget Speech** refers to the annual presentation by the member of the Executive Council on what strategies the department will be pursuing in the coming financial year.
- **MEC** refers to the Member of the Executive Council for the Department of Basic Education in Limpopo.
- **Management** refers to the District Senior Manager, Circuit Managers, Managers
- **Strategic plan** refers to the strategic plan of the department for the financial year 2008 – 2012
- **Synergy** is the means towards an end and there can be many and varied ways of achieving that end.

1.9 Study plan

The research report consists of five chapters organized as follows:

Chapter 1

This is an introductory chapter. It consists of the background, significance, aims and objectives, problem statement and research question. The aim is to contextualize the research and to state the overall aims and goals of the study. The chapter defines terms that are relevant in this research report and outlines the study plan.

Chapter 2

The Literature review covers the strategic management process, with special emphasis on integration of strategic formulation and implementation. Key drivers of strategy formulation and strategy implementation and their outcomes will be theoretically explored.

Chapter 3

The chapter discusses the research design and methodology followed in this study. Sample design and sampling methods will be explained .The researcher will discuss the techniques and procedures to collect the data.

Chapter 4

Analysis and interpretation of research data.

Chapter 5

Conclusions and recommendations.

CHAPTER 2

2.1. Introduction

The essence of literature review in scientific research forms the theoretical framework which is the building blocks of the researcher's arguments. Literature review, according to Leedy and Ormrod (2005:64), describes the theoretical perspectives and previous research findings regarding the problem at hand. Its function is to look again at what others have done in similar areas, though not necessarily identical to one's area of research.

This chapter provides an overview of the literature that will be used to obtain answers to the research questions. Driving the research questions is the literature review and will be relied on extensively during the data collection process. The study will cover the two major components of strategic management which are strategy formulation and strategy implementation. The review will in particular explore in more detail, the integration of strategy formulation and implementation. A case of Greater Sekhukhune District Department of Basic Education will be used in the context. The implementation of the coordinated and integrated formulated strategies is the responsibility of the management.

2.2. Strategic Management

There are as many definitions of strategic management concepts as there are writers in the field of strategic management. A few of such are explored briefly.

2.2.1 The purpose of strategic management

Ehlers and Lazenby (2007:2) define strategic management as, ' the process whereby all the organizational functions and resources are integrated and coordinated to implement formulated strategies which are aligned with environment, in order to achieve the long-term objectives of the organization and therefore gain a competitive advantage through adding value for the stakeholders.' The most important term here is 'competitive advantage'. What makes one firm better than another? Why do some companies outperform their rivals with fewer resources,

capital and even specialist employees? The answer lies in competitive advantage. Competitive advantage is the edge that an organization has over others. To be able to achieve such a competitive advantage, an organization needs to meet the need of stakeholders, which means adding value. Adding value can be defined as adding certain characteristics to the product/ service that competitor and customer (or other stakeholders) cannot do themselves. Therefore, in order to achieve competitive advantage value should be added and this is done by the process of strategic management. In support of the concept of adding value Ehlers et al (2007:2), Rowe, Mason, Dickel, Mann and Mockler (1994:2) define strategic management as,' the process which organizations determine what value is needed and how to add that value.' It means ensuring that organization can cope effectively with myriad of demands placed on them from within and without.

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2.2.2 Strategic management formulation and implementation

David (2009:36) define strategic management as, ' the art and science of formulating, implementing, and evaluating cross-functional decisions that enable an organization to achieve its objectives.' Whereas Pearce and Robinson (2007:3) define strategic management as, ' the set of decisions and actions that result in the formulation and implementation of plans designed to achieve an organization's vision, mission, strategy and strategic objectives within the business environment in which it operates.' Central to these definitions are key words like decisions, actions, formulation, and implementation of the organization's objectives. This implies that any strategic decision making process culminates in formulating decisions and implementing them. These decisions (strategies) are implemented in order to achieve organizational goals and objectives, which is the ultimate aim of the strategic process. However, the critical action is how to integrate their formulation and implementation so as to determine what value is needed and how to add that value.

David's (2009:36) definition contains the same features with that of Pearce et al (2007:3) in many respects. They both highlight organizational objectives, formulation and implementation of decisions (strategies) as central to any strategic management process.

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According to Rowe et al (1994), as stated in Louw and Venter (2008:21) stated that from their perspective, strategic Management is concerned with:

a. Effective strategies that balance the organization's resources and capabilities, values and goals with its external environment. In doing so, strategic managers are responsible for establishing a   clear direction for the organization and a means of getting there, which requires the creation of strong competitive positions; and

b. The implementation of a strategy in such a manner that all the organizational architecture and activities are synergistically integrated in order to achieve effective performance.

Hence, the above perspective is in line with the definition by Ehlers et al (2007:2) as stated above.

Thompson and Martin (2005:12) cautioned that strategic management per se based on past and current success will not guarantee continued prosperity and success. However, constant organization - wide learning, vision of the future, strategic flexibility to deliver and a team approach towards employees and stakeholders, would assists in sustaining prosperity and establishing a sustained competitive advantage. This can be achieved only if strategy is formulated and implemented properly.

Larson (2008: 24) concurs with David (2009:37) that the components of strategic management are closely linked, and all are directed towards the future success of the organization. Larson (2008:25) states that strategic management requires strong links among mission, goals, objectives, strategy formulation and implementation. According to David (2009:37), the logical starting point of strategic management includes identifying an organization's existing vision, mission, objectives and strategies because a firm's present situation and conditions may preclude certain strategies and may even dictate a particular course of action. David (2009:38) states that, 'the strategic management never really ends.' Hence, Ehlers et al (2007:5) caution that, 'the strategic management process does not end once an organization has selected a strategy or strategies. To be of value strategies have to be implemented successfully. '

According to Thompson & Strickland (2003:365), 'Strategy implementation is an integral component of the strategic management process and is viewed as the process that turns the

formulated strategy into a series of actions and then results to ensure that the vision, mission, strategy and strategic objectives of the organization are successfully achieved as planned'

> *Strategy implementation* requires a firm to establish annual objectives, device policies, motivate employees, and allocate resources so that formulated strategies can be executed. Strategy implementation includes developing a strategy – supportive culture, creating an effective organizational structure, redirecting market efforts, preparing budgets, developing and utilizing information systems, and linking employee compensation to organizational performance. Strategic implementation often is called "action plan" of strategic management.

2.2.3 Strategy evaluation

Strategy evaluation consists of three fundamental activities:

    a. Reviewing external and internal factors that are basis for current strategies,

    b. Measuring performance, and

    c. Taking corrective actions

The following two propositions by Rowe et al (1994), as stated in Louw and Venter (2008:21) triggered this research:

a. Effective strategies that balance the organization's resources and capabilities, values and goals with its external environment. In doing so, strategic managers are responsible for the introduction of strategy drivers to establish a   clear direction for the organization and a means of getting there, which requires the creation of strong competitive positions; and

b. The implementation of a strategy in such a manner that all the organizational architecture and activities are synergistically integrated in order to achieve effective performance.

Thus the research report will deal with *Strategy Formulation* and *Strategy Implementation*, especially their integration. The justification for this choice is that good strategies which cannot be implemented effectively, remains a critical challenge to the strategic leadership and the whole organization. Most organizations spend more resources in the formulation phase and sometimes fail to implement their strategies which result in fruitless and wasteful expenditure of scarce resources.

The whole process of strategic management is depicted graphically below in a model developed by David (2009:46) as an integrated three- stage decision –making framework, as shown is figure 2.1. This model will be emulated to develop the framework for this research.

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Figure 2.1 Strategic Management Model
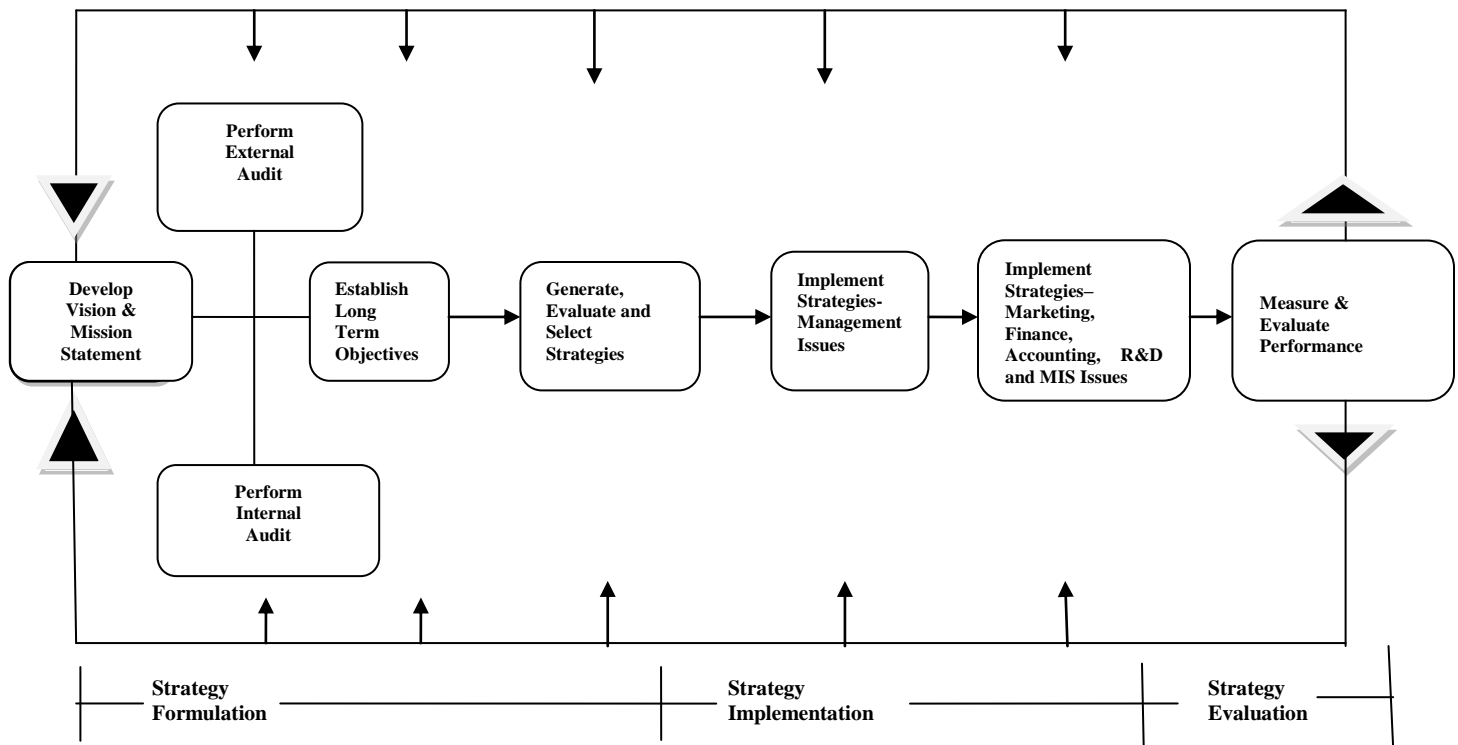
(Source: Adapted from David (2009:46)

2.3 Drivers of Strategy formulation

According to David (2009:37) *Strategy formulation* includes, ' developing a vision and mission, identifying an organization's external opportunities and threats, determining internal strengths and weaknesses, establishing long-term objectives, generating alternative strategies, and choosing particular strategies to pursue. Strategy – formulation issues include deciding what new business to enter, what businesses to abandon, how to allocate resources, whether to expand operations or diversify, whether to enter international markets, whether to merge to form joint venture, and how to avoid a hostile takeover.' David (2009:82) argues that organizations, before they can pursue any strategy, have to define the reason why they exist and what do they want to become in future. This assists the organization to focus on what game plan and which rules govern this game. When the set of beliefs about a business at its inception is put into writing, the resulting document mirrors the same basic ideas that underline the vision and mission statements.

Pearce et al (2005:37) say vision statement present the firm's strategic intent that focuses the energies and resources of the company on achieving a desirable future. Pearce et al (2005:37) agrees with David (2009:82) that vision statements should be short, preferably one sentence, and as many managers as possible should have an input into developing the statement.

2.3.1. Vision and Mission

The mission statement follows from the vision. Pearce et al (2005:38) define company mission as "the fundamental purpose that sets a firm apart from other forms of its type and identifies the scope if its operations in product and market terms". David (2009:85) however, says profit, not mission or vision, is the primary corporate motivator. Profit alone is not enough to motivate people. Profit, however, is perceived negatively by some employees in companies. Employees may see profit as something that they earn and management then uses and even gives away to shareholders. Although this perception is undesired and disturbing to management, it clearly indicates both profit and vision are needed effectively to motivate a workforce. The author further recognizes that when employees and managers together shape or fashion the vision and mission for a firm, the resultant document can reflect the personal visions that managers and employees have in their hearts and minds about their own futures. Shared vision creates

commonality of interests that can lift workers out of the monotony of daily work and put them into a new world of opportunity and challenge.

Pearce et al (2005:37) recognize that 'mission statement is a message designed to be inclusive of the expectations of all stakeholders for the company's performance over the long run.' Therefore, this calls that when formulating a mission statement, management should be very sensitive to the claims of stakeholders, both inside the organization and outside.

Vision goes beyond words, into action. The vision has to be brought into life. And, again, that is not so much through formal plans and programmes as by informal actions, the rolling up of sleeves and getting in there with everyone else. Pearce et al (2005:34) argue that the mission of a company is the unique purpose that sets it apart from other companies of its type and identifies the scope of its operations.

Pearce et al (2005:28) and David (2009:93) agree that Mission Statements can and do vary in length, content, format, and specificity. The authors further agree that most practitioners and academicians of strategic management feel an effective statement exhibits nine characteristics or components. The mission statement includes the following essential components:

1. Customers – who are the firm's customers?
2. Products or services – what are the firm's   major products or services?
3. Markets – geographically, where does the firm compete?
4. Technology – is the firm technologically current?
5. Concern for survival, growth, and profitability – is the firm committed to growth and financial soundness?
6. Philosophy – what are the basic beliefs, values, aspirations, and ethical priorities of the firm?
7. Self-concept – What is the firm's designative competence or major competitive advantage?
8. Concern for public image – is the firm responsive to social, community, and environmental concerns?
9. Concern for employees – are employees a valuable asset of the firm?

David (2009:93) outlines the following characteristics of a mission statement. The author says a mission statement should (be):

- Broad in scope

- Less than 250 words in length

- Inspiring

- Identify the utility of a firm's product

- Reveal that the firm is socially responsible

- Reveal that the firm is environmentally responsible

- Include nine components: customers, products or services, markets, technology, concern for survival / growth /profits, philosophy, self- concept, concern for public image, concern for employees

- Enduring

According to Thomson and Strickland (2003:245) and David (2009:88), key stakeholders should be consulted when developing the vision and mission statement to assist in the ownership of processes resulting from this exercise. Thompson et al (2003:245), put it very clear that, "armed with a clear, well-conceived business cause for the organization to follow, managers have a beacon to guide resource allocation and a basis for crafting a strategy to get the company where it needs to go".

2.3.2 Long term objectives

David (2009:176) indicates that, 'Clearly stated and communicated objectives are vital for success for many reasons. Firstly, objectives help stakeholders to understand their role in the organization's future. Secondly, they also provide a basis for consistent decision making by managers whose values and attitudes differ. The author went further to mention that, 'objectives set forth organizational priorities and stimulate exertion and accomplishment. They serve as standards by which individuals, groups, departments, divisions, and entire organization can be evaluated. Objectives provide the basis for designing jobs and organizing activities to be performed in an organization. Objectives should be quantitative, measurable, realistic,

understandable, challenging, hierarchical, obtainable, and congruent among organizational units.'

According to Thompson et al (2003:325), 'the purpose of setting objectives is to convert managerial statements of strategic vision and business mission into specific performance targets results and outcomes, the organization wants to achieve.' The authors have pointed out further that when companywide objectives are broken down into specific targets for each organizational unit and lower- level managers that are held accountable for achieving them, a result-orientated climate builds throughout the enterprise. Identifying and evaluating external opportunities and threats enable organizations to develop clear mission, to design strategies to achieve long-term objectives and to develop policies to achieve annual objectives. Pearce et al (2005:221) conclude that, 'In actual decision situation, objectives, the strategic choice would be complicated by a variety of interactive opportunities, feasible company objectives, promising grand strategy opportunities, and evaluative criteria.'

2.3.3 Outcomes of drivers of strategy formulation

At a glance, the strategic management model provides the framework for the research throughout this research, and seems to suggest that strategic choice decision making leads to the sequential selection of long-term objectives and grand strategies. In fact, however, strategic choice is the simultaneous selection of long-range objectives and grand strategies. When strategic planners study their opportunities, they try to determine which are the most likely to result in achieving various long-range objectives. Almost simultaneously, they try to forecast whether an available grand strategy can take advantage of preferred opportunities so the tentative objectives can be met. The actual outcomes of the drivers of strategy formulation are the vision and mission statements, establishment of the long-term objectives and grand strategies, and finally the generation, evaluation, and selection of strategies to be followed. The process to be followed in achieving the above will not be followed in this research.

The purpose of setting objectives is to convert managerial statements of strategic vision and organizational mission into specific performance targets results and outcomes, the organization wants to achieve. When an organization wide objectives are broken down into specific targets for

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2.4 The drivers of strategy implementation

David (2009:260) states that the strategic management never really ends. This means that the strategic management process does not end once an organization has selected a strategy or strategies. To be of value strategies have to be implemented successfully. David (2009:37) agrees that strategies formulated but not implemented serve no useful purpose. The author further states that strategy implementation requires a firm to establish annual objectives, device policies, motivate employees, and allocate resources so that formulated strategies can be executed. Strategy implementation includes developing a strategy-supportive culture, creating an effective organizational structure, redirecting market efforts, preparing budgets, developing and utilizing information systems, and linking employee compensation to organizational performance.

Strategic implementation is often called 'action plan' of strategic management.' Good strategy formulation is inseparable from good business entrepreneurship. Wickham (2004:293) broadly defined strategy as,' the actions an organization takes to pursue its business objectives.' The author further states that strategy drives *performance* and an effective strategy results in a good performance. The strategy can be defined as a statement regarding what the company wants to be

and how it plans to get there. Strategy creates a sense of unity or consistency of action, throughout an organization. Strategy should respond to the change in external and internal factors that have an influence on the organization. The problem is that most strategies are general and vague. People who are supposed to implement them sometimes misinterpret them and implement different strategies that are not related to the organization's goals or objectives. Therefore, a caution should be given that, for a strategy to be considered effective, a chosen strategy must be implemented successfully. Execution is fundamental to strategy and has to shape it; no worthwhile strategy can be planned without taking into account the organization's ability to execute it. E*xecution* can be defined as a systematic process of rigorously discussing hows and whats, questioning tenaciously following through, and ensuring accountability.

The reason why many strategies fail is the missing link between the chosen strategy and the organizational goals. This missing link is strategy implementation. This link can explained as the gap between what a company's leaders want to achieve and the ability of their organization to deliver it.

The challenge that most organizations face is the transition from strategy formulation to strategy implementation. David (2009:38) draws attention to the fact that, " the transition from strategy formulation to strategy implementation requires a shift in responsibility from strategists to divisional and functional managers" .Here the researcher will focus on the District Senior Manager, Circuit Managers and Chief Education Specialists, and do reference to schools, which are the end point of the delivery. This is where the missing link starts. Hence, lack of the integration of strategy formulation and implementation. Implementation problems can arise because of this shift in responsibility, especially if strategy-formulation decisions come as a surprise to middle-and-lower-level Managers. Therefore, it is essential that circuits and schools managers be involved as much as possible in strategy-formulation activities. Of equal importance, strategists should be involved as much as possible in strategy – implementation activities."

Ehlers et al (2007:212) define strategy implementation as, 'the process that turns strategic plans into a series of action tasks, and ensures that these tasks are executed in such a way that the objectives of the strategic plan are achieved. In other words, strategy implementation is the

communication, interpretation, adoption and enactment of strategic plans.' It is clear that strategic implementation deals with translating thought, or the strategic plan into action. A leader must ensure that the strategy is integrated to avoid confusion. An integrated approach to strategy, culture and structure lead to sustainable advantage. Pearce et al (2005:288) point out that 'once corporate and business strategies have been agreed upon and long-term objectives set, the strategic management process moves into a critical new phase –translating strategic thought into organizational action. In the words of two well-worn phrases, they move from "planning their work" to "working their plan" as they shift their focus from strategy formulation to strategy implementation.'

According to Ehlers et al (2007:216) and David (2009:37) strategy implementation has the following drivers and instruments:

- Leadership
- Developing short-term objectives which are implementable
- Policies
- Reward systems
- Organizational culture
- Organizational structures
- Resource allocation

2.4.1 Leadership

Leadership, specifically strategic leadership, is widely described as one of the key drivers of effective strategy implementation, Pearce et al (2005:339). Robbins et al (2009: 290) define leadership as the ability to influence a group toward the achievement of a vision or set of goals. However, a lack of leadership, and specifically strategic leadership by the top management of the organization, has been identified as one of the major barriers to effective strategy implementation (Alexander1985: 91-97; Business Day 1999:37; Beer & Eisenstat 2000:29; Kaplan & Norton 2004:227; Hrebiniak 2005:17). Strategic leadership is defined as, 'the leader's ability to anticipate, envision, and maintain flexibility and to empower others to create strategic change as necessary' Hitt, Ireland & Hoskisson (2007:375). Strategic leadership is multifunctional, involves managing through others, and helps organizations cope with change that seems to be

increasing exponentially in today's globalised business environment, Huey (1994:42-50).Strategic leadership requires the ability to accommodate and integrate both the internal and external business environment of the organization, and to manage and engage in complex information processing. According to Hitt et al (2007:384) and Pearce et al (2005:342) the following identifiable actions characterize strategic leadership that positively contributes to effective strategy implementation, namely:-

- Determining strategic direction
- Establishing balanced organizational controls
- Effectively managing the organization's resource portfolio
- Sustaining an effective organizational culture
- Emphasizing ethical practices
-

Pearce et al (2005:342) states that, 'All managers adapt structures, create teams, implement systems, and otherwise generate ways to coordinate, integrate, and share information about what their organization is doing and might do.' Whereas Hitt (2007:384) is of the opinion that 'Strategic leaders have a role to play in each of the above-mentioned strategic leadership actions. In turn, each of these strategic leadership actions positively contributes to effective strategy implementation.'

2.4.2. Short Term Objectives

Pearce et al (2005:288) states that, 'short-term objectives translate long-range aspirations into this year's targets for action. If well developed, these objectives provide clarity, a powerful motivator and facilitator of effective strategy implementation. To make business strategies, grand strategies, and long-term objectives become a reality, the people in an organization that actually, "do the work" of the business need guidance in exactly what needs to be done today and tomorrow to make those long-term strategies become reality. Short-term objectives help do this. They provide much more specific guidance for what it is to be done, a clear delineation of impending actions needed, which helps translate vision into action'.

Pearce et al (2005:288) further state that, 'Short –terms objectives help implement strategies in three ways. First, short-term objective "operationalize" long –term objectives. Second, discussion about an agreement on short-term organizational priorities and stimulate exertion and accomplishment objectives help raise issues and potential conflicts within an organization that usually require coordination to avoid otherwise dysfunctional consequences. The third way short-term objectives assist strategy implementation is to identify measurable outcomes of action plans or functional activities, which can be used to make feedback, correction, and evaluation more relevant and acceptable.'

David (2009:176) states that, 'annual objective should be quantitative, measurable, realistic, understandable, challenging, hierarchical, obtainable, and congruent among organizational units.' David (2009:263) further states clearly, 'that annual objectives should be consistent, reasonable, challenging, and clear, communicated throughout the organization, characterized by an appropriate time dimension and accompanied by commensurate rewards and sanctions. Objectives should state quantity, quality, cost, and time-and also verifiable.' The author further states that, 'annual objective should be compatible with employees' and Managers' values and should be supported by clearly stated policies.'

2.4.3 Policies

David (2009:264) states that "policies let both employees and managers know what is expected of them, thereby increasing the likelihood those strategies will be implemented successfully. They provide basis for management control, allow coordination across organizational units and reduce the amount of time managers spend making decisions. Policy also clarify what work is to be done and by whom. They promote delegation of decision making to appropriate management levels where variable problems usually arise. Whatever their scope and firm, policies serve as a mechanism for implementing strategies and obtaining objective. However, policies may be written and formal or unwritten and informal, wherein, informal, unwritten policies are usually associated with a strategic need for competitive secrecy'. David (2009:264) broadly define policies as, ' referring to specific guidelines, methods, procedures, rules, forms, and administrative practices established to support and encourage work toward stated goals. On the other hand Pearce et al (2005:297) define policies as 'directives designed to guide the thinking,

decisions, and actions of manage and their subordinates in implementing a firm's strategy. Policies communicate guidelines to decisions. They are designed to control decisions while defining allowable discretion with which operational personnel can execute business activities.'

2.4.4. Organizational culture

Organizational culture consists of the following elements:-

- Shared values, beliefs and attitudes
- Way of doing things
- Thinking pattern and behavior
- Perception and assumptions

2.4.4.1. Definition

Different scholars have provided several definitions to the concept of organizational culture. A few which unexplored are as follows:

Gibson, Ivancevich and Donnelly (1998:30) define organizational culture as, 'what the employees perceive and how this perception creates a pattern of beliefs, values and expectations. Culture therefore presupposes beliefs and value systems'. Robbins et al (2009:424) and Pearce et al (2005:345) define organizational culture as, 'a system of shared meaning/assumptions (often unstated) held by members, distinguishing the organization from other organizations. '
According to Jacques (1952:251) as quoted by Senior (1997:101) organizational culture as its customary and traditional way of thinking and doing things, which is shared to a greater or lesser degree by all its members, and which new members must learn, and at least partially accept, in order to be accepted into service in the firm. Organizational culture in this sense covers a wide range of behavior; the objectives of the concern; its way of doing things, the methods of payment, the values placed on different types of work, beliefs democratic living and joint consultation.' The analysis of these definitions shows that there is agreement amongst authors across different ages and countries.

Luthans (2002:122) defines organizational culture as a "pattern of assumptions-invented, discovered, or developed by a given group as it learns to cope with its problems of external

adoption and internal integration – that has worked well enough to be considered valuable and, therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems". In support of Luthans (2002:122), Larson (2008:72) and Robbins, Judge, Odendaal & Roodt (2009:424) , 'perceive organizational culture as system of shared meaning held by members, distinguishing the organization from other organizations'. The above four elements form a centre of organizational culture. All the authors who wrote in different countries, times and environment regarding what a culture or is suppose to refer to, fully agree as touching the four key areas.

2.4.4.2. The role of organizational culture play during strategy implementation?

Ehlers et al (2007:224) acknowledge "organizational culture can either be a valuable or stumbling block to successful strategy implementation. When organization's beliefs, vision and objectives underpinning its chosen strategy are compatible with its organizational culture, culture serves as a valuable driver and simplifies strategy implementation efforts".

Robbins et al (2009:424) hold the view that "culture serves five critical functions in organizations: Firstly, has a boundary defining role; that is, it creates destination between one organization and other organizations. Secondly, it conveys a sense of identity to organization members. Thirdly, facilitates commitment to something larger than individual self interest. Fourthly, it enhances social system stability. Culture is social glue that helps to bind the organization by providing appropriate standards for what employees should say and do. Finally, culture serves as a meaningful control mechanism that guides and shapes the attitude and behavior of employees".

If the culture of the organization is hostile or negative, the environment is contaminated with gossips, bad attitudes, withholding of crucial information, backstabbing, etc, which will make it impossible for the organization to deliver on its mandate.

2.4.4.3. Types of organizational cultures

Ehlers et al (2007225) divide culture into four broad categories: strong, weak, unhealthy and adaptive cultures.

Strong culture

Thompson (1996:78) states that, 'Culture is reflected in the way people in an organization perform tasks, set objectives and administer resources to achieve them.' The author further states that culture affects the way they make decisions, think, feel, and act in response to opportunities and threats. One can define a strong culture as an organizational culture with a consensus on the values that drive the company and with an intensity that is recognizable even to outsiders.

Ehlers et al (2007:225), and Thompson and Strickland (2001: 415) emphasize, 'in strong organizational cultures, values, norms, and beliefs are deeply ingrained and difficult to eliminate.' Debra and Quick (2003 221) hold the view that, 'strong cultures are thought to facilitate performance for three reasons. Firstly, these cultures are characterized by goal attainment that is all employees share common goals. Secondly, strong cultures create a high level of motivation because of the values shared by the members. Thirdly, strong cultures provide control without the oppressive effects of the bureaucracy.' Ehlers et al (2007:225) caution that "if a tight fit exerts between the chosen strategy and a strong culture, it is a valuable asset. However, if a strong culture that does not match chosen strategy or strategies are a liability to the organization and the strategy implementation'.

Weak culture

Thompson et al (2001:415) explain that "a company's culture can be weak and fragmented in the sense that many sub-cultures exist, few values and behavioral norms are widely shared there are few sacred traditions. In weak culture companies, there's little cohesion and glue across organization units--top executives don't repeatedly espouse any business philosophy or exhibit commitment to particular values and ingrained business approaching organization members typically have no deeply felt sense of corporate identity'. The authors further explain that "the lack of a definable corporal character tends to resulting many employees viewing the company as a place to work and their job as a way to make a living. As a consequence, '*weak cultures provide little or weak strategy implementing assistance* because there are no traditions, beliefs, values, common bonds, or behavioral narrows that management can use as leverage to mobilize commitment to executing the chosen strategy.' According to Ehlers et al (2007:225) weak cultures cannot serve as a drive for strategy implementation.

Unhealthy culture

According to Thompson et al (2001:416) and Ehlers et al (2007:225) unhealthy cultures undermine a company's performance. The authors point out that, 'an organization is characterized as *unhealthy* if it has a politicized internal environment that allows influential managers to operate autonomous "*fiefdoms*" and resist needed change. Unhealthy organizational cultures are characterized by a hostile resistance to change and people who advocate new ways of doing things'. Thompson et al (2001:416) further states the following traits of unhealthy cultures, " promoting managers who are good at staying within their budgets exerting close supervision control over their units and handling administrative detail as opposed to managers who understand vision, strategies and culture building and who are good leaders, motivators, and decision makers.'

Adaptive cultures

Ehlers et al (2007:226) and Thompson et al (2001:417) point out that, 'Adapting cultures are characterized by receptiveness to risk taking innovation and experimentation. Members shared a feeling of confidence that the organization can deal with whatever threats and opportunities come down the pike. Entrepreneurship is encouraged and rewarded.' Companies with adaptive cultures have carefully and deliberately staffed their organization with people who are proactive, who rise to the challenge of change, and who have an aptitude of adapting.

2.4.5 Organizational structure

Changes in strategy often require changes in structure so as to dictate how resources will be allocated. On the other hand structure largely indicates how objectives and policies will be established.

David (2009:267) advises that, 'changes in structure can facilitate strategy-implementation efforts, but changes in structure should not be expected to make a bad strategy good, to make a bad management good, or to make products sell. Structure undeniably can and does influence structure.' David (2009:266) points out that, 'change in strategy often requires changes in the way an organization is structured for two major reasons. First, structure largely indicates how objectives and policies will be established. The second major reason why changes in strategy often require changes in structure is that structure dictates how resources will be allocated. The

author further emphasizes that "members' external and internal forces affect an organization; no term can change its structure in response to every one of these forces, because doing so would lead to chaos. However, when a firm changes strategy, the existing organizational structure may become in affective.' Whereas Thompson et al (2001:319)warns that, ' every firm's organization chart is idiosyncratic, reflecting prior organizational patterns; varying internal circumstances execute judgments about reporting relationships, and the politics of who gets which assignments. Moreover, easy strategy is grounded in its own set of key success factors, and value chair activities. So, a customized organizational structure is appropriate.'

2.4.5.1 Organizational structure defined

According to Greenberg et al (2008:584) organizational structure refers, 'to the formal configuration between individuals and groups with respect to the allocation of tasks, responsibilities, and authorities within an organization'. But according to Robbins et al (2009) organizational structure defines how job tasks are formally divided, grouped and coordinated. Debra et al (2003:223) define organizational design as, ' a process of constructing and adjusting an organization's structure to achieve goals. The authors point out strategies and goals provide legitimacy to the organization as well as employee direction, decision guide lines, criteria for performance. In addition, strategy and goals help the organization fit into its environment.'

2.4.5.2 Symptoms of an ineffective organizational structure.

David (2009:267) points out that, 'symptoms of an ineffective organizational structure include too many people, too much attention being devoted toward solving *info departmental* conflicts, too large a span of control, and too many unachieved objectives. Changes in structure can facilitate strategy-implementation efforts, but changes in structure should not be expected to make a bad strategy good, to make a bad management good, or to make bad products sell.'

2.4.5.3 Structure follows strategy

The concept *structure follows strategy* is widely used in strategic management literature. Ehlers et al (2007:247) state that this statement confirms, or emphasizes, that a change in the chosen strategy necessitates a change in structure. The authors warn that when a tight fit between strategy and structure is absent, the organization's performance will decline, as it experiences

administrative problems, resource allocation problems and conflicting priorities regarding strategy implementation tasks.

David (2009:266) points out that , 'structures should be destroyed to facilitate the strategic pursuit of a firm and therefore, follows strategy. Without a strategy or reason for being (mission, design) an affective structure is difficult. The structure of an organization is a formal way of identifying, who is to take responsibility for what; who is to exercise authority over whom; and who is to be answerable to whom.'

2.4.5.4. Different types of organizational structures

.David (2009:267) is of the opinion that, 'Structure undeniably can and does influence strategy. Strategies formulated must be workable, so it is a certain new structure required massive structural changes it would not be an attractive one. In this way, structure cannot shape the choice of strategy. But a more important, important concern is determining what types of structural changes are needed to implement new strategies and how these changes can best be accomplished,' The researcher examines this issue by focusing on five types of organizational structure: functional, divisional structure, the strategic business unit (SBU) structure, the dedicated teams and the matrix structure.

The functional structure

The functional structure is the most widely used structure because this structure is the simplest and least expensive of the other five alternatives.
According to David (2009; 267) and Ehlers et al (2007; 249) 'a functional structure group tasks and activities by business function; such as production/operations, marketing, finance/ accounting, research and development, and management information systems; promotes specialization of labor, encourages efficiency; minimizes the need for an elaborate control system; and allows rapid decision-making.' David (2009:267), however warns that, 'A functional structure leads to short term and narrow what is best for the firm as a whole.'

The divisional structure

According to David (2009:268), 'the divisional structure can be organized in one of four ways: *by geographic area, by product or service, by customer or by process*. With divisional structure functions are performed both centrally and in each separate division."

David (2009268) warns that, 'the most important limitation is that a divisional structure is costly, for a number of reasons. Firstly, each division requires functional specialist who must be paid. Secondly, there exist some duplication of staff services, facilities and personnel. Thirdly, managers must be well qualified because divisional design forces delegation of authority; better qualified individuals require higher salaries. It also requires an elaborate headquarters driven control system.' Whereas Ehlers et al (2007:250) is of the opinion that 'the advantage of a divisional structure includes clear accountability, career development opportunities, and local control of local situations and allows strategies to be adapted easily.'

The Strategic Business Unit structure.

According to David (2009:270) and Ehlers et al (2007:252), the Strategic Business Unit (SBU) structure groups' similar divisions into Strategic Business Units and delegates authority and responsibility for each unit to a senior executive who reports directly to the group Chief Executive Officer. David (2009:270) further states that, "this shape in structure can facilitate strategy implementation by improving coordination between similar divisions and channeling accountability to a distinct business unity. The author states that the structure requires an additional layer of management, which increases salary expenses, and that the role of the group vice-president is often ambiguous as the two disadvantages of the strategic business unit structure. However, these limitations often do not outweigh the advantages of improved coordination of improved accountability.

Dedicated team-structure

According to Gray et al (2008:61), 'dedicated teams operate separate units from the rest of the parent organization. Usually a full-time project manager is designated to pull together groups of specialists who work full-time on the project. The project manager recruits necessary personnel from both within and outside parent company. The subsequent team is physically separated from the parent organization and given matching orders to complete the project'. The authors have

identified the fallowing weaknesses of dedicated teams: expensive; cause internal strife, limited technological expertise and difficult post project transition.

The matrix structure

Robbins et al (2009:407) state that, 'matrix management is a hybrid organizational form in which a horizontal project management structure is "overlaid" on the normal functional hierarchy. In a matrix system, there are two chains of command, one along functional lines and the other along project lines. Instead of delegating segments of a project to different units or creating an autonomous team, project participants report simultaneously to both functional and project managers. Essentially, the matrix combines two forms of departmentalization: *functional* departmentalization and *product* departmentalization.' The authors state that the strength of the matrix lies in its ability to facilitate coordination when the organization has a multiplicity of complex and interdependent activities, and facilitation of the efficient allocation of specialists. According to David (2009:271), ' for a matrix structure to be effective, organizations need participative planning, training, clear mutual understanding of roles and responsibilities, excellent internal communication, and mutual trust and confidence.'

2.5 Integrated Management Systems

The strategy alignment succeeds because of structured or completely flexible strategy a process that does:-

- Consolidate strategic ideas,
- Synchronize or align strategies of different organizational units,
- Give proper consideration to consensus and commitment among key decision makers,
- Ensure specific objective narratives,
- Strategic are put in place,
- Change is fast and not stifled. It is easy to change strategy and the actual operations quickly in response to new opportunity, and the organization is always ahead of competition,
- Strategy is placed within a formal planning and measurement structures, strategy defined in terms of specific goals and the outcomes of accomplishing these goals,

- Conflicting requirements for resources, present in all businesses, are generally resolved, resulting in resources being allocated to priority mission-critical work.

The total business implements the plans with whole-hearted buy-in and commitment. A business is best aligned with its respect to its corporate strategies when the interests of all stakeholders in the business are in alliance with the strategic objectives of the business itself. Through debate and challenge, functional strategies must be developed that support agreed markets. Only in this way can coherent strategies be forged that align all functions to support the business. Thus, corporate strategy is the outcome of functional strategies and can only be achieved by integrating across the functional boundaries; corporate strategy then is both the binding mechanism for and the result of this process. Thus, all functions within a business need to be party to agreeing to the blueprint of corporate strategy. They are then party to the debate and its resolution that facilitates the identification of the individual strategies necessary to support agreed direction and for which each function takes responsibility.

Synchronization is essential for excellence in execution and for energizing the corporation. Synchronization means that all the moving parts of the organization have common assumptions about the external environment over the operating year and a common understanding; the left hand knows what the right hand is doing. Synchronizing includes matching the goals of the interdependent parts and linking their priorities with other parts of the organization. When conditions change, synchronization re-aligns the multiple priorities and re-allocates resources.
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2.6 The outcomes of the drivers of strategy implementation

The ability to influence others towards the achievement of a vision or set goals of an organization needs a determined strategic leadership; however, a lack thereof is identified by (Alexander 1985:91-97; Business day 1999:37; Beer & Eisenstat 2000:29; Kaplan & Norton 2004:227; and Hrebiniak 2005:17) as one of the major barriers and a driver of effective strategy implementation. Pearce et al (2005:288) state that, 'short-term objectives translate long-range aspirations into this year's targets for action. If well developed, these objectives provide clarity, a powerful motivator and facilitator of effective strategy implementation. To make business strategies, grand strategies, and long-term objectives become a reality, the people in an

organization that actually, "do the work" of the business need guidance in exactly what needs to be done today and tomorrow to make those long-term strategies become reality. Short-term objectives help do this. They provide much more specific guidance for what it is to be done, a clear delineation of impending actions needed, which helps translate vision into action.'

 Policies are instruments for strategy implementation. Policies set boundaries, constraints and limits on the kinds of administrative actions that can be taken to reward and sanction behavior; the clarity what can and cannot be done in pursuit of an organization's objectives. Organizational culture is perceived as system of shared meaning held by members, distinguishing the organization from other organizations.

Organizational culture consists of the following elements:-

- . Shared values, beliefs and attitudes
- Way of doing things
- Thinking pattern and behavior
- Perception and assumptions

Changes in strategy often require changes in structure so as to dictate how resources will be allocated. On the other hand structure largely indicates how objectives and policies will be established. David (2009:267) advises that, 'changes in structure can facilitate strategy-implementation efforts, but changes in structure should not be expected to make a bad strategy good, to make a bad management good , or to make products sell'.

This all means structure cannot shape the choice of strategy.

2.7 Achievement of integrated strategic management

2.7.1 Integrated capabilities and resonance

As stated earlier, an alignment is not a simple combination of static components. Each of the elements involved in the (co-)alignment has its own dynamics and behaves at its own rate, governed by the forces external to the organization. According to Brown, Lamming, Bessant and Jones (2005:49) , 'the success of operations strategy has nothing to do with how long the planning process has taken, nor has it to do with how nicely or how wonderfully articulately the strategy is presented to the firm's employees – if indeed strategy is articulated to employees! Rather, the success of operations strategy will be determined by the extent to which it will focus

operations' efforts into an integrated set of capabilities. These capabilities should, in turn, enable the firm to compete in the increasingly competitive environment common to many industries.' Fortune (in Brown et al 2005: 49) was of the opinion that,' the challenge is to put the strategy, systems, and capabilities in place, and then drive deployment and execution.' However, Brown (2000:6) is of the opinion that, 'a solution to the conundrum comes with the notion of *strategic resonance*.' The author defined strategic resonance as: "…an ongoing, dynamic, strategic process whereby customer requirements and organizational capabilities are in harmony and resonate. Strategic resonance is more than strategic fit – a term which has often been used (rightly in the past) to describe the "fit" between the firm's capabilities and the market that it serves. Strategic resonance goes beyond that strategic fit may be likened to a *jigsaw* where all parts fit together. This is a useful view but it can have…a very static feel to it. In strategic fit it is as if once the "bits" are in place, the strategic planning is done.'

"By contrast, strategic resonance is a dynamic, organic process, which is about ensuring continuous linkages and harmonization between:

- The market and the firm's operations capabilities;
- The firm's strategy and its operations capabilities; and
- All functions and all levels within the firm.

'Firm's need to find and exploit their strategic resonance: between markets and the firm; within the firm itself; and between senior -level strategists and plant-level operations capabilities' Brown et al (2005:70). How is this achieved? through the performance management system.

2.7.2 The performance management system

A well-designed strategic–management system can fail if insufficient attention is given to the human resource dimension. Human resource problems that arise when businesses implement strategies can usually be traced to one of three causes: (1) disruption of social and political structures, (2) failure to match individuals' aptitudes with implementation tasks, and (3) inadequate to management support for implementation activities. Wunder (2006:2) states that, 'The whole is more than the sum of the parts' This famous Aristotle quote serves as strategic imperative. According to Wunder (2006:5), 'Today, the combination of the strategy map, balanced scorecard (BSC), and strategic action program (strap) has become a standard within the

strategy process. Yet it's hard to find much information on applying these integrated concepts to the strategic alignment processes among strategic business units (SBUs), global functions or services, and regions within the MNC's often complex organizational structure. Strategy maps help clarify, describe, and-most importantly-align strategic objectives of these different units; balanced scorecard (BSCs) and straps ensure strategic control and execution.'

2.8 The integrated strategic management process framework

The theory discussed in chapter two will now be summarized in a framework for analyses. The process of strategic management is depicted graphically below:
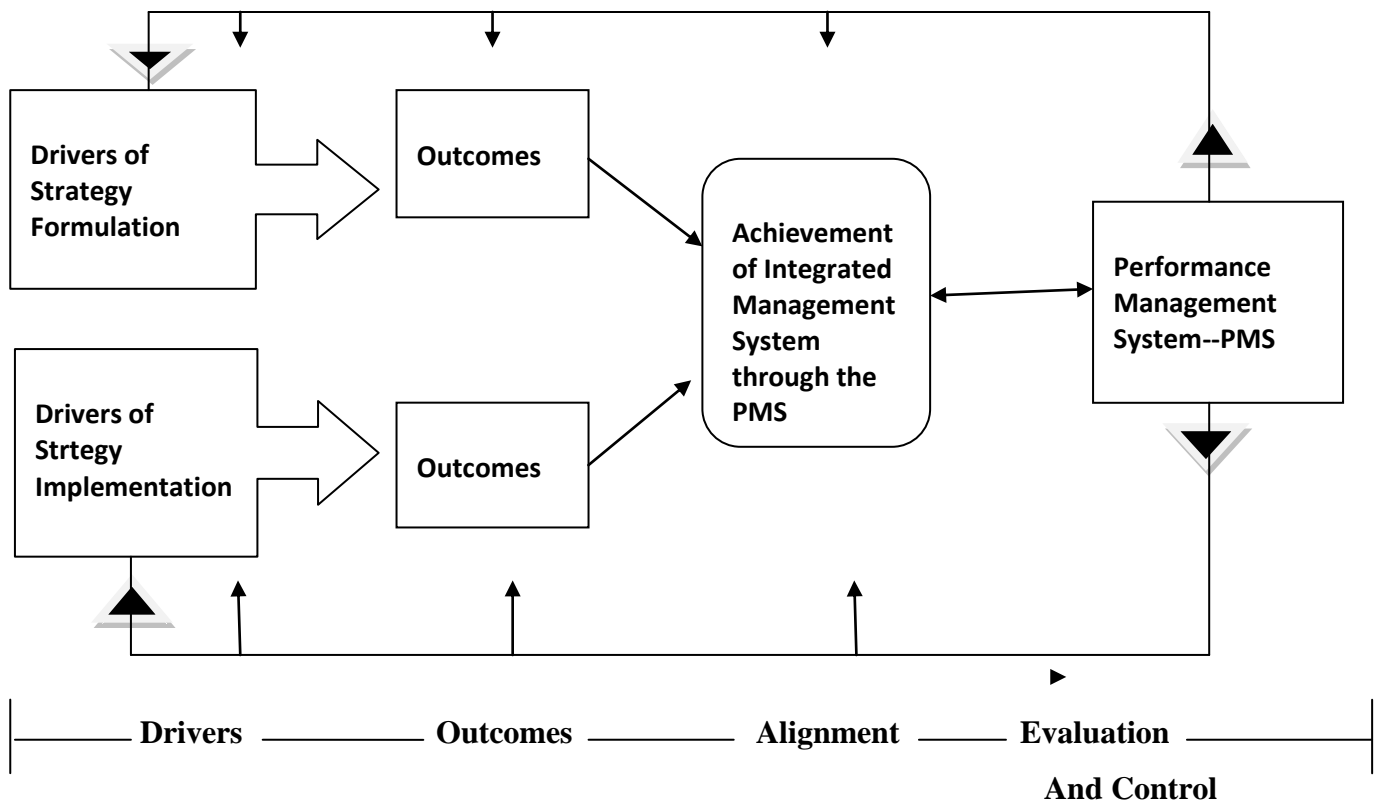
Figure 2.2. The integrated strategic management process framework

The researcher used the following as research framework as depicted in figure 2.2 above.

- The drivers of strategy formulation process will produce outcomes
- The drivers of strategy implementation process will produce outcomes
- The alignment of these process result in outcomes that are aligned, i.e. the achievement of integrated strategic management

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- The performance management system monitors individual performance of managers

The evaluation and control of key performance areas (KPAs) during the performance management process will result in feedback to whether the outcomes of the drivers are aligned or and if are not aligned, they warrant a re-visit.

The researcher used the framework as depicted in figure 2.2 above.

Conclusion from the literature review

From the literature review, the following were identified as the key drivers of strategy formulation and implementation, which together, if properly integrated, contribute to the achievement of the organizational goals: (1) for *strategy formulation* are

- ➢ Vision and Mission statement
- ➢ Long Term Objectives; and (2) for *strategy implementation* are
  - ▪ Leadership
  - ▪ Short Term Objectives
  - ▪ Policies
  - ▪ Organizational Culture, and
  - ▪ Organizational Structure

Without a proper leadership, a shared sense of vision in order to direct strategy cannot be achieved. Employees can be tempted to do their own things guided by personal growth rather than by the goals of the organization. Integration is an important element in strategy formulation and implementation, providing a vital tool for resource allocation to avoid wastage and duplication.

Similarly, not only is the integration process of key drivers important for strategy formulation and implementation, but such a process must provide space for feedback.

Strategic management, if applied correctly, can assist the public sector to achieve its goals and objectives in an efficient and effective manner. This can be achieved by adopting an integrated approach to strategy formulation and implementation, taking into consideration, all the drivers that are essential for strategy formulation and implementation. Well aligned outcomes of the drivers of the strategy formulation and implementation could help with the achievement of Integrated Management System through the Performance Management System

The next chapter will outline the research methodology that would be followed to collect data and information, the research designs well as the analysis of data collected.

CHAPTER 3

RESEARCH METHODOLOGY

3.1. Introduction

The purpose of this chapter is to outline the research methodology that was followed in this research to collect data and information. The research design will be discussed as well as the analysis of data collected.

3.2. Research design and methodology

Welman, Kruger & Mitchel (2006:102) define research design as a plan to obtain appropriate data for investigating the research hypothesis and / or questions. This can be regarded as a plan or blueprint of how one intends to conduct the research. According to Leedy & Ormrod (2005:6) 'Research Methodology directs the whole endeavor: It controls the study, dictates how the data are acquired, arranges them in logical relationships, sets up an approach for refining and synthesizing them, suggests a manner in which meanings that lie below the surface of the data become manifest, and finally yields a conclusion or series of conclusions that leads to an expansion of knowledge.'

Research Methodology can be regarded as the "how" of the collecting data, and the processing thereof within the framework of the research process. There are two basic methodologies for collecting data that can be distinguished namely:- quantitative and qualitative methods. The most obvious destination to a reader between quantitative and qualitative research is the form of data presentation. Quantitative methodology presents statistical results represented by numbers while qualitative methodology presents facts in 'a narration form with words'. However, the differences is much more than this narrow distinction.

In this study, the researcher will use qualitative research methodology. Qualitative approach is an effort to understand situation in their uniqueness as part of a particular content and their interactions. Qualitative implies that the data are to a greater extent in the form of words as

opposed to numbers. According to Pilking Horne (1992:112) qualitative approach is especially useful in the generation of categories for understanding human phenomenon and the investigation of the interpretation and meaning that people give events they experience.

3.3 The Population

The population consists of a District Senior Manager, nine (9) Small Business Units (SBUs) Managers, thirty three (33) Circuit Managers, 28 selected staff members in the Small Business Units (SBUs) who are involved in the strategy planning. The Researcher will target the management of the Greater Sekhukhune District Department of Basic Education. Managers are categorized according to seniority and are spread throughout the district. They are categorized as District Senior Manager, Managers, Circuit Manager, selected Staff Members (who are randomly selected from various Small Business Units based at the District Office). District Senior Manager, Managers, and selected Staff Members are stationed at Lebowakgomo (District Offices); Circuit Managers are stationed at thirty three circuits spread throughout the district. All targeted managers, a District Senior Manager, (9) Managers, (28) randomly selected Staff Members and (33) Circuit Managers; work for the Greater Sekhukhune District Department of Basic Education, Limpopo Province. These are the only people who are virtually/actually involved in the strategy planning of the district. Principals from both primary and secondary schools *will not be covered* in the research, as they are not in any way involved in the strategy formulation of the district, but *only* the implementation thereof.

3.4. Validity and Reliability

According to Payne and Payne (2005:195), 'There are two main questions about credibility of research. The first addresses whether we could get the similar results if the study were repeated. The second question is more challenging: even if the same results were obtained, would they be *right*, i.e. have we actually measured what we needed to look at, in a way that accurately captures its characteristics? The first question is about *reliability*, the second about *validity'*

3.4.1. Reliability

According to Newman (2000:164), 'reliability means dependability or consistency. It suggests that the same thing is repeated or recurs under identical or very similar conditions.' Whereas Payne et al (2005:195) state that, ' reliability is about being confident that the *way* data were gathered could be *repeated without the methods themselves produce different results.'*

The researcher will distribute the qualitative questionnaire, with the same questions to all the managers and selected staff members in the district. Follow-up processes will be conducted with selected managers and selected staff members to double check by way of a re-test after a month and ensure that the information is reliable and consistent. Telephones and one-on-one interviews will be used for this purpose.

3.4.2. Validity

According to Payne et al (2005:196) validity, ' refers to the capacity of research techniques to encapsulate the characteristics of the concepts being studied, and so properly to measure what methods were intended to measure.' Whereas Newman (200:164) states that, ' validity suggests truthfulness and refers to the match between constructs, or the way a researcher conceptualizes the idea in a conceptual definition; and a measure. It refers to how well an idea about reality 'fits' with actual reality.
'

The researcher will ensure validity by selecting all managers at all levels, including District Senior Manager and Staff Members who are engaged in strategy management, but ***not*** school principals. Every member of the management team, i.e. Managers, Circuit Managers, District Senior Manager, and selected Staff Members who are engaged in strategy management will be included in the population.

3.5. The Research Instrument

The researcher will use a Qualitative survey to gather data. A questionnaire will be distributed to Circuit Managers through district distribution points and hand delivered to the other Managers and selected Staff Members at the district. A follow-up will be made with individuals by telephone and one-on-one interviews. This is to increase reliability.

3.6. The questionnaire Items

Open ended questions will be asked in the questionnaire. Respondents will be free to express their opinions on the questions asked.

3.7. The Research Process

The researcher will, as a first step, define the problem or identify real issue. This will be done by answering the research questions through questionnaires and follow-up will be conducted. The second step will involve proper literature review to determine what has been done in the past about this problem or issue and what were the findings. Some literature survey was done by the researcher, but it is very clear that challenges still exist, as a result more need to be done. The third step will involve collecting information on strategic management especially reports and documents from the Greater Sekhukhune District Department of Basic Education, Limpopo Province to get more insight into what could be the real matter. The fourth step will involve the selection or the development of the appropriate measuring instruments or processes to collect the required data or information. The fifth step will involve the actual performance of the necessary actions to collect data or information from managers. The sixth step will involve the structuring of the collected data and its analysis by using appropriate analysis by using appropriate analytical techniques. The seventh, which is the final step, will involve the interpretation of the results and coming to some conclusion, which may result in relevant recommendations and suggestions.

3.8. Collection, presentation and analysis of data

The researcher will distribute questionnaires through collection points at the district for circuit managers, and hand deliver to all managers stationed at the district during the period 19th – 31st May 2010. The questionnaire will be collected through the same methods /instruments before the 30th June 2010. Outstanding questionnaire will be collected personally by the researcher from the respondents. The researcher will collect relevant documents from the Greater Sekhukhune District Department of Basic Education, Limpopo Province. Permission to peruse and utilize documents and information will be obtained from the District Senior Manager of Greater Sekhukhune District Department of Basic Education, Limpopo Province by the researcher.

According to Watkins (2006:461), qualitative data analysis involves organizing, accounting for and explaining the data; in short, making sense of data in terms of the participants' definitions of the situation, noting patterns, themes, categories and regularities. The author went further to state that qualitative data analysis is often heavy on interpretation, and one has to note that there are frequently multiple interpretations to be made of qualitative data- that is the glory and their headache!

 The researcher must be clear what he or she wants the data analysis to do as this will determine the kind of analysis that is undertaken. As explained by Patton (1985:01), ' qualitative approach is an effort to understand situation in their uniqueness as part of a particular content and their interactions.' Qualitative implies that the data are to a greater extent in the form of words as opposed to numbers. One may come to realize that qualitative approach is useful in the generation of categories for understanding human phenomenon and the investigation of the interpretation and meaning that people give evidence they experience. Using words rather than numbers can be especially valuable to readers because 'words' especially when they are organized into incidents or stories, have a concrete, vivid, meaningful flavour that often proves far more convincing to a reader than pages of numbers.

3.9. How will validity and reliability be ensured?
3.9.1. Validity
 Leedy et al (2005:29) points out that "the validity of a measurement instrument is the extent to which the instrument measures what it is supposed to measure.' In congruent to Leedy et al (2005:29), Payne et al (2005:196) define validity as, ' the capacity of research techniques to encapsulate the characteristics of the concepts being studied, and so properly to measure what methods were intended to measure.' Whereas Newman (2000:164) states that, 'validity suggests truthfulness and refers to the match between constructs, or the way a researcher conceptualizes

the idea in a conceptual definition; and a measure. It refers to how well an idea about reality 'fits' with actual reality'.

The researcher will enhance validity by including every member of the management team, District Senior Manager, Managers, Circuit Managers, and selected Staff Members. The researcher will ensure validity of data-collection by constructing open-ended questions which are not direct and leading. The use of an accepted body of knowledge to derive the instruments will also improve validity.

3.9.2. Reliability

Leedy et al (2005:93) states that, 'the reliability of a measurement instrument is the extent to which it yields consistent results when the characteristic being measured hasn't changed.'
The authors further state that, 'A researcher can enhance the reliability of a measurement instrument in several ways. First, the instrument should always be administered in a consistent fashion; in other words, there should be standardization in use of the instrument from one situation or person to the next. Second, to the extent that subjective judgments are required, *specific criteria* should be established that dictate the kinds of judgments are required the researcher makes. And third, any research assistants who are using the instrument should be *well trained* so that they obtain similar results.

According to Welman (2006:109), 'reliability is concerned with the findings of the research and related to the credibility of the findings.' In determining whether our findings are reliable, we need to ask the following question: will the evidence and conclusion stand up to the closest scrutiny?

Raymond (1993:55) states that, 'It stands to reason that if we measure a construct (for example management success) by means of a particular instrument (for example taxable profit calculation formula or a management training course examination paper), comparable measurements should be obtained for the same individuals / objects irrespective of, for example, when the instrument is administered, which particular version of it is used, and who is applying (administering and scoring) it' Whereas Brynard and Hanekom (2006:96), Payne et al(2005:195) and Welman et al (2006:110) agree that the same instrument must be able to produce the same data at a later stage

under similar conditions, e.g. by means of a test-retest technique. The researcher will distribute one questionnaire with the same questions to all managers and selected staff members in the district.

Same questions will be directed to all to eliminate biasness and distortion.
The researcher will follow-up on the responses by checking the relevant documents and also observe some of the information provided in order to take utmost care of the effect of incorrect data.

3.10. Assumptions

There are various models influencing strategy formulation and implementation and they will be combined to form the embedded knowledge that this research is based on.

3.11. Limitations of the Study

3.11.1. The study does not attend to cover all literature about strategic management, formulation, implementation and key drivers of strategy formulation and key drivers of strategy implementation.

3.11.2 The study includes the development of an integrated approach to strategy formulation and implementation in the Greater Sekhukhune District Department of Basic Education Limpopo Province, not a comprehensive strategy of the Department of Basic Education

3.12. <u>CONCLUSION</u>

This Chapter will assist the researcher to collect data systematically using the research methodology and design explained to gather information or data and documents from the department. The next chapter will present data from the questionnaire.

Chapter 4

Statement of Findings

4.1 Introduction

In this chapter, the researcher will present the results from the questionnaires. The statement of findings presents a summary of the data, which will be analyzed in the following chapter.

4.2 Population

Management in the Greater Sekhukhune District Department of Basic Education, Limpopo Province is divided into the following recognizable strata: District Senior Manager, nine Managers, and thirty three Circuit Managers. The District Senior Manager, Managers and Circuit Managers constitute the top management of the Greater Sekhukhune District Department of Basic Education, Limpopo Province. They are mainly small business units (SBUs) managers and in charge of policy and strategic matters in the district. There are nine Managers in the district who are responsible for the following small business units (SBUs): Financial Management, Operational Support, Human Resource, Curriculum Advisory Services, Corporate Services, Quality Assurance, Learner Assessment, Special Projects, and Governance. The District Senior Manager and all small business units (SBUs) Managers are stationed at District Office.

The thirty three Circuit Managers are spread throughout the district and stationed at various circuits and they are the next level of management of the district. They are mainly in charge of strategy and policy implementation; and provide monitoring, evaluation and support to schools under their jurisdiction. Greater Sekhukhune District Department of Education, Limpopo Province comprises of the district office, thirty three circuits, and 585 primary schools and 346 secondary schools. The district is headed by the District Senior Manager who is in charge of the whole district. The thirty three Circuit Managers and nine managers report to the District Senior Manager.

4.3 Number and Percentages of Responses Received

The researcher distributed the questionnaires to District Senior Manager, all nine small business units (SBUs) Managers, thirty three Circuit Managers and twenty eight selected Members of Staff who were involved in the strategic planning of the district. The table below indicates the number of responses received from the targeted population.

Table 1.1

Management Level	Total Population	Number of Responses	% of Responses
District Senior Manager	1	1	100%
Circuit Managers	33	22	67%
Managers	9	8	89%
Selected Staff Members involved in Strategic Planning of the district- from small business units (SBUs)	28	19	68%
Total	**71**	**50**	**70%**

4.4 Presentation of Findings

The main results will be described and summarized through answering questions as presented to respondents in the questionnaires.

4.4.1 What sources inform strategy formulation undertaken by the district?

The District Senior Manager (100%) indicates that the sources of strategy formulation are the state of the nation address by the Minister of Basic Education, the Member of the Executive Council (MEC)'s Budget speech, Departmental Policies, and Provincial Strategic Plan.

All (100%) Managers have indicated that the following sources inform the strategy formulation undertaken by the district:- Constitution of the Republic of South Africa, The political five year plan (including the manifesto), Departmental (five year plan, three year MTEF, and Annual Plans), Presidential pronouncements, South Africa Schools Act, Provincial Strategic Plan,

Provincial Annual Performance Plan (APP), State of the Nation Address by the President and the state of the Provincial Address by the Premier.

Fourteen out of twenty two (67%) of the Circuit Managers have indicated that the sources are State of the Nation Address by the President, State of the Province Address by the Premier, the Member of the Executive Council (MEC)'s Budget speech, Service Delivery Improvement Plans and Provincial Office Strategic Plan (Annual Performance Plan). Two (10%) have indicated Policy documents and District Budget Allocation as sources. Three (14%) have indicated that the sources that inform the strategies are analysis of results, systemic evaluation, overall performance of the schools and consolidation of responses from the schools. One (5%) has indicated that the sources that inform the strategies are different sectional needs and goals. One (5%) has indicated that the district uses information from circuits as circuits use information from schools, whereas one (5%) has not responded to this question.

Most selected Staff Members, sixteen out of nineteen (84%), have indicated that strategies are informed by the State of the Nation Address by the President, State of the Province Address by the Premier, the Member of the Executive Council (MEC)'s Budget speech, Service Delivery Improvement Plans and Provincial Office Strategic Plan (Annual Performance Plan) and further indicated that each sub –directorate's needs and operational challenges and District Annual Plan. One (5%) of the selected Staff Members has indicated that he/she is not aware of any as their supervisor had just selected a few officials to attend strategy planning, whereas one (5%) selected Staff Member has not responded to this question. One (5%) of the selected Staff Members has indicated that the sources that inform the strategy formulation undertaken by the District are the poor grade 12 results.

4.4.2 How is strategy formulated in the District?

The District Senior Manager (100%) has indicated that the District strategy formulation is based on the Provincial Strategic Plan and the Provincial Annual Performance Plan and he further has indicated that the process also encompasses the Presidential state of the Nation Address, Member of the Executive Council (MEC)'s budget speech and the Provincial Turnaround Strategies.

All (100%) Managers have indicated that the District formulated their strategy through a District *lekgotla* where individual small business units (SBUs) draft their strategy based on the Provincial Annual Performance Plan (APP), and Departmental turn-around strategy. During a three day working sessions members from various small business units (SBU) interrogated the Annual Performance Plan to ensure applicability and address the needs of the District.

Most Circuit Managers have indicated that the strategy is formulated collaboratively by various small business units (SBU) at the district and Circuit Managers in compliance with Provincial Vision and Mission statements and target objectives as per Annual Performance Plan (APP) through a District Strategic Planning Retreat over a period of two days at a common place. Twenty out of twenty two (95%) of the Circuit Managers have responded positively to the statement and also indicated that different small business units (SBU) form own strategies which are consolidated into one district strategy with the participation of all Managers and Circuit Managers. Two Circuit Managers (9%) have not responded how the strategy is formulated in the District.

Most selected Staff Members have indicated that the strategy is formulated collaboratively by various small business units (SBU) at the district and Circuit Managers in compliance with Provincial Vision and Mission statements and target objectives as per Annual Performance Plan (APP) through Annual District Strategic Planning. Fifteen out of nineteen (79%) of the selected Staff Members have responded positively to this statement and have also indicated that the strategy is formulated by means of a collective participation by all Mangers and Circuit Managers. One (5%) of the selected Staff Members has indicated that strategy is formulated by analyzing learner results. However, three (16%) of the selected Staff Members have indicated

contrary to the first statement by stating that strategy is formulated by few Managers leaving Deputy Managers and employees below the level of Managers.

4.4.3 Who is responsible for strategy Formulation?

The District Senior Manager (100%) has indicated that the District Management is responsible for the strategy formulation in the District.

Managers (100%) have indicated that the Head Office Officials from Strategic Planning Research Unit, District Management, Corporate Services and Circuit Managers.

Most Circuit Managers have indicated that District Senior Manager, Small Business Units (SBU) Managers, Circuit Managers, Head Office(Provincial) representatives, Social Partners at district level and selected Staff Members from different Small Business Units (SBU) in the district, led by Corporate Services which is tasked to organize, coordinate and consolidate the formulation of the strategy for the district. Seventeen out of twenty two (77%) have responded positively to the statement. Three (13%)have indicated that Schools, Circuits, Circuit Management Committee, all stakeholders or District is responsible, whereas One (5%) has indicated that an Extended Management Meeting is responsible and One (5%) has not responded to this question.

Eighteen out of nineteen(95%) of the selected Staff Managers have indicated that the District strategy is formulated by the District Senior Manager, Circuit Managers and small business units(SBUs) Managers. One (5%) of the selected Staff Members has indicated that it is supposed to be the responsibility of everybody in the district, which does not exist.

4.4.4 What is your role in the strategy formulation?

The District Senior Manager (100%) has indicated that his role in the strategy formulation is to give direction on the formulation of the District Strategic Plan.

Most Managers have indicated that their role in the strategy formulation is to give inputs in the whole process. Seven out of eight (88%) Managers have responded positively to this statement and also have indicated that they led their small business units (SBU) in the strategy formulation.

However, one (12%) Manager has indicated that at the moment he/she has no role in the strategy formulation, other than implementation only.

Twenty out of twenty two (90%) of the Circuit Managers have responded that their role is to give inputs and ensuring that the strategy formulated truly fits into the Provincial Annual Performance Plans, District and Circuits Performance Plans and providing oversight. One (5%) has indicated that his/her role is to guide schools, whereas, one (5%) Circuit Managers has not responded to this question.

Fourteen out of nineteen (74%) of the selected Staff Managers have indicated that their role in strategy formulation is to give inputs to sectional heads for strategy consolidation. Two (10%) of the selected Staff Members have indicated that their role is not clarified, whereas, the other three (16%) of the selected Staff Members have indicated that they do not play any role besides implementing the formulated strategy.

4.4.5 Where is the responsibility of the strategy formulation located?

The District Senior Manager (100%) has indicated that the responsibility of strategy formulation is located in the District and Province.

Seven out of eight (88%) Managers have indicated that the responsibility of the strategy formulation is located in the Head of Department, District Senior Manager, and District Corporate Services sub-unit. One (12%) of the Managers has indicated that the responsibility of the strategy formulation is located in *all* the sections in the district.

Sixteen of the Circuit Managers (76%) have indicated that the responsibility of the strategy formulation is located in the management of the district in collaboration with Circuit Managers and schools. Five (5%) have indicated that the responsibility of the strategy formulation is located at Provincial Office, District Office, Circuit Offices and Schools. One (5%) has not responded to this question.

Sixteen out of nineteen (84%) of the selected Staff Members have indicated that responsibility of the strategy formulation is located in the office of the District Senior Manager and Provincial office, and Corporate Services office. Two (11%) of the selected Staff Members have indicated that the responsibility of strategy formulation is located with District Senior Manager and Head of Department. One (5%) of the selected Staff Members has indicated that the strategy formulation is located with all of the district personnel, even though the majority is not involved in the strategic planning process.

4.4.6 How do circuits sufficiently support the district corporate strategy?

The District Senior Manager (100%) has indicated that the Circuit Plans and Programmes are based on the District Corporate Strategy; hence, Circuits sufficiently support the district corporate strategy.

Four out of eight (50%) Managers have indicated that Circuits sufficiently support the District corporate strategy as Circuit Managers form part of strategy formulation and are actively involved. Whereas, four (50%) of the Managers have indicated that Circuits to a lesser extend support the District Corporate Strategy formulation as reports from Circuits do not meet minimum requirements.

Eighteen out of twenty- two (81%) of the Circuit Managers concur that circuits support the district corporate strategy by ensuring that all areas of the strategy formulated are realized and in any circuit strategy corporate strategy issues of the district are considered to be one of the priorities, though two (9%) of the Circuits Managers have indicated that circuits' support is minimal and hampered by Administration Support Staff who seem to defy everybody and are bent on personal enrichment. One (5%) has not indicated and One (5%) has responded that circuits' support of the district corporate strategy usually ends up at the district and it does not go down to circuits, and if it does go down, other stakeholders/employees are not brought to its discussion to allow planning to emerge from its strategic objectives set by both district and province.

Most of the selected Staff Members have indicated that circuits support district corporate strategy through inputs during strategy formulation. Eleven out of nineteen (58%) of the selected Staff Members have responded positively to this statement. Seven (37%) of the selected Staff Members have indicated that the circuits do not sufficiently support the district corporate strategy for they are always running parallel programmes. One (5%) of the selected Staff Members has not responded to this question.

4.4.7 Which special skills and people does the District currently lack but critically need to help to develop for its strategy implementation?

The District Senior Manager (100%) has indicated that the district lacks the skill and people who can align the strategic plan and the timeframes for implementation.

All (100%) Managers have indicated that the District lacks the skilled and effective managers who would formulate and implement the formulated strategies, managers equipped with project management skills, Senior Education Specialists for commercial subjects and mathematics; and the following skills: time management skills, change management, subject knowledge from curriculum advisor, and facilitation skills.

Most of the Circuit Manager have indicated the following skills and people to be currently lacking but to be critically needed to help develop for its strategy implementation:- Strategic Planners, Curriculum Advisors, Social Partners who are expected to be particularly active, people with scarce skills to co-ordinate departmental programmes, project management skills, conflict resolution skills, and those who would be able to monitor the implementation of the strategies. Nineteen out of twenty- two (86%) of the Circuit Managers have responded positively to the statement and have further indicated that critiquing of policies and other pieces of the legislation, planning and technological devices are a serious challenge; and has further indicated that all employees must first be involved in strategy planning and managers be trained and skilled in strategy management. Whereas three (14%) have not responded to this question.

Most of the selected Staff Members have indicated the following skills and people to be currently lacking but critically needed: e-Personnel, Curriculum Material Developers, Competent

Mathematics Curriculum Advisors, Strategic Unit Section Personnel, and reasonable number of Curriculum Advisors; and management skills, facilitation skills,. All (100%) selected Staff Members have responded positively to this statement and have also indicated the skill in aligning the strategic plan and the management of time frames for implementation.

4.4.8 Where is the responsibility for implementation of the strategy located?

The District Senior Manager (100%) has indicated that the responsibility for implementation of the strategy is located at schools.

All (100%) Managers have indicated that the responsibility for strategy implementation is located in all small business units (SBU) of the district, however, one has indicated that this approach is misplaced, as it still encourages top –up approach as opposed to bottom- up approach when implementing the formulated strategies.

All (100%) Circuit Managers have indicated that the responsibility is located in the offices of the District Senior Manager (DSM), Circuit Managers, Small Business Units (SBUs) Managers, and lastly the Schools which are at the coal-face of education delivery.

All (100%) of the selected Staff Members have indicated that the responsibility for implementation of the strategy lies with the Head of Department, District Senior Manager, Circuit Managers and Schools.

4.4.9 What processes are there to support the implementation of the strategies?

The District Senior Manager (100%) has indicated that the processes that are there to support the implementation of the strategies are monitoring and support, and mentoring and couching.

Two out of eight (25%) of the Managers have indicated that the provision of adequate and quality human resource, finances, and physical resources. Four (50%) of the Managers have indicated that the processes that are there to support the implementation of the strategies are

monitoring and support, and mentoring. Whereas, two (25%) of the Managers have indicated that there is no stipulated processes, where each unit implements anyway and anyhow.

Most of the Circuit Managers have indicated that the monthly reports , quarterly reports, operational plans, job descriptions, action plans, processes of monitoring and support, evaluation and reviewing, meetings, on-site monitoring and support, workshops and training courses. Seventeen out of twenty- two (77%) of the Circuit Managers have responded positively to this statement and have also indicated that the tracking of reporting programmes and assisting officers in sharpening their skills as the processes that support the implementation of the strategies. But, on the contrary, two (9%) have indicated that implementation is abrupt and monitoring is done at a lesser scale, sometimes it is only done for the sake of report writing, which confuses circuits and schools.   Three (14%) have indicated that there are no processes to support the implementation of the strategies.

Thirteen out of nineteen (68%) of the selected Staff Members have indicated the process of monitoring and support to schools as a process to support the implementation of the strategies. Whereas, six (32%) of the selected Staff Members have indicated that there are no processes to support the implementation of the strategies in the district.

4.4.10 How is the strategy formulation linked to the strategy implementation?

The District Senior Manager (100%) has indicated that the strategy formulation addresses the Vision of the Department whereas the organizational structures are responsible for the implementation of the strategy.

Six out of eight (75%) of the Managers have indicated that in the past strategy formulation was done at the top management level whereas implementation occurred at the middle and lower level. However, lately, an attempt is being made to involve the lower levels in making inputs so that the link is not purely top-down. Two (25%) of the Managers have indicated that there is no clear link as strategies are formulated using the top-down approach.

Most Circuit Managers have indicated that there is a link between the strategy formulation and implementation because the strategy formulation also includes the activity plans which have clear timelines and targeted activities and people. Sixteen out of twenty- two (72%) Circuit Managers have responded positively to the statement and have also indicated that officials' work plans and sectional operational plans are informed by the strategies and strategic goals inform operations in various sections. Three (14%) indicated that the strategy formulation and strategy implementation are not linked. They further have indicated that strategies are formulated and are not implemented because there are no implementation plans or measurement plans. However, three (14%) have not responded to this question.

Most of the selected Staff Members have responded in such a way that they do not understand how strategy formulation could be linked to strategy implementation. Thirteen out of nineteen (68%) of the selected Staff Members have responded positively to this statement and have also indicated poor planning and management, structures, and the number of the officials to implement the strategy and the management plan drawn as how the strategy formulation could be linked to the strategy implementation. Three (16%) of the selected Staff Members have indicated that the link is not clear as those responsible for formulation are not the direct implementers, whereas, only two (11%) of the selected Staff Members indicated that the strategy formulation is linked to strategy implementation through the performance contracts and through line managers. One (5%) of the selected Staff Members has not responded to this question.

4.4.11 How does the organizational culture support the implementation of the strategy?

The District Senior Manager (100%) has indicated the culture of the organizational periodic review to assess the strategic implementation, as the one that supports the implementation of strategies.

Four out of eight (50%) of the Managers have indicated that the organizational culture is negative as most employees do not comprehend their actions as contributing to the overall goals and objectives achievement and one (12.5%) Manager has indicated that the district organizational culture needs re-engineering. Two (25%) of the Managers have indicated that

there is no support as most educators in the District are commuting between their homes and work places. Whereas, one (12.5%) Manager has indicated that he/she is not able to respond to this question as the organizational culture is not clear to him/her as he/she sees a relaxed atmosphere of non-submission, non-compliance to policies and legal documents.

Most of the Circuit Managers seem not to understand what an organizational culture is. Seventeen out of twenty- two (72%) have responded positively to this statement and have also indicated that the organizational culture is not supported. However, one (5%) Circuit Manager has indicated that there is a strong organizational culture emerging but it is delayed because some small business units (SBUs) Managers and Circuit Managers are still hostile to the District Senior Manager who is relatively new and seem to link directly with their subordinates. But, five (23%) have not responded to this question.

Eleven out of nineteen (58%) of the selected Staff Members have indicated that the organizational culture is positive as is supported through values and objectives, giving full moral support by working resources available, through structured and unstructured activities. However, Four (21%) of the selected Staff Members have indicated that organizational culture is negative and therefore it does not support the implementation of strategies. Two (11%) of the selected Staff Members are not sure of how organizational culture support the implementation of strategies as they indicated that strategic planning is new and need advocacy, and the signing of the performance contracts. Whereas, one (5%) of the selected Staff Members has indicated that he/she does not know how the organizational culture supports the implementation of the strategies.

4.4.12 How well are the responsibilities defined in relation to the chosen strategy?

The District Senior Manager (100%) has indicated that the responsibilities are defined in terms of branches (small business units) in the District for implementation purposes.

Five out of eight (63%) of the Managers have indicated that responsibilities are outlined in small business units (SBU) Work Plans, where project management approach is used. Two (25%)

Managers have indicated that the responsibilities are not clearly defined, however, there is always a person assigned in the unit to account. Whereas, one (12.5%) Manager has not responded to this question.

Most of the Circuit Managers have indicated that roles are well defined, clarified and spelt out, *for example*, Examination Section- incident free, Curriculum Section- high level of learner performance, *et cetera*. Eleven out of twenty- two (50%) of the Circuit Managers have responded positively to the statement and have further indicated that during operational plan developments, all roles are clearly defined for role players in relation to their strategic objectives, and chosen according to organizational structure and expertise. Four (18%) have indicated that responsibilities are not well clarified in the strategic plan and also indicated that there is a need to draw a separate activity plan for each strategic objective One (5%) has indicated that the roles are clarified well on paper, but the implementation is a challenge. . Six (27%) have not responded to this question.

Twelve out of nine-teen (63%) of the selected Staff Members have indicated that the responsibilities are well- defined in relation to the strategy chosen, which was clarified during strategy formulation in relation to key objectives of the sectional units and key performance areas (KPAs). Six (32%) of the selected Staff Members have indicated that the responsibilities are not well- defined. One (5%) has not responded to this question.

4.4.13 Who controls the strategy implementation?

The District Senior Manager (100%) has indicated that the strategy implementation is controlled by the District Management under the supervision of the District Senior Manager.

Seven out of eight (87.5%) of the Managers have indicated that the strategy implementation is controlled by the District Management under the supervision of the District Senior Manager.

Most of the Circuit Managers have indicated that the District Senior Manager, Managers, Circuit Managers, and School Management Teams control the strategy implementation. Fourteen out of twenty two (64%) of the Circuit Managers have responded positively to this statement and

further indicated that the District controls the strategy implementation of the District and Circuits, Circuits control the strategy implementation of the Curriculum Advisors, Deputy managers and the Support Staff at circuits, and Schools under their jurisdiction. But one (5%) has indicated that it is not known who controls the strategy implementation *as no one* monitors *and controls* strategy implementation at all levels of the district structures. Seven (31%) have not responded to this question at all.

All nineteen (100%) of the selected Staff Members have indicated that the District Senior Manager, Managers, and Circuit Managers control the strategy implementation

4.4.14 How does the organizational structure allow for the integration of the strategy formulation and implementation?

The District Senior Manager (100%) has indicated that the organizational structure is built in a way to achieve the Vision and Mission of the Department which allows for the integration of the strategy formulation and implementation.

Six out of eight (75%) of the Managers have indicated that strategy is informed by what takes place in the various sub-units on a day to day basis and that various small business units (SBU) work interdependently to achieve set goals. One (12.5%) Manager has indicated that organizational structure does not allow for the integration of the strategy formulation and implementation. Whereas, one (12.5%) Manager has not responded to this question at all.

Most of the Circuit Managers have indicated that organizational structure allows for the integration of the strategy formulation and implementation which makes room for accountability and protocol. Twelve out of twenty- two (55%) of the Circuit Managers have indicated positively to this statement and have further indicated that this differs from one section to another as some sections have only the manager. Ten (45%) of the Circuit Managers have not responded to this question at all.

Most of the selected Staff Members have indicated that organizational structure allows for the integration of the strategy formulation and implementation. Fifteen out of nineteen (79%) of the

selected Staff Members have indicated positively to this statement by indicating that strategy is informed by what takes place in the various sub-units on a day- to- day basis and that various sections work interdependently to achieve goals set, however, two (11%) of the selected Staff Members have not responded to this question at all; and one (5%) of the selected Staff Members has indicated that he/she does not know how the organizational structure allows for the integration of the strategy formulation and implementation. One (5%) of the selected Staff Member has indicated that additional staff would allow for the integration of the strategy formulation and implementation.

4.4.15 What are the drivers of strategy formulation?

The District Senior Manager (100%) has indicated that planning, monitoring and support are the drivers of the strategy formulation.

Four out of eight (50%) of the Managers have indicated that the Provincial Vision and Mission Statements, Annual Performance Plans, and Provincial Strategic Plan are the drivers of strategy formulation. Three (37.5%) of the Managers have responded that the grade 12 results, Managers, and specialists in various units are the drivers of strategy formulation. Whereas, one (12.5%) Manager has not responded to this question at all.

Fewer of the Circuit Managers have been able to indicate that the Provincial Vision and Mission Statements, Annual Performance Plans, Provincial Strategic Plan are the drivers of strategy formulation. Eleven out of twenty- two (50%) of the Circuit Managers have responded positively to the statement and have further indicated the Performance Systems and the Underperformance as the drivers of strategy formulation. But, Eleven (50%) have not responded to this question at all.

Nine out of nineteen (47%) of the selected Staff Members have indicated that the responsible sub-directorate at Provincial Office, Management at the district and Circuits as the drivers of strategy formulation. Four (21%) of the selected Staff Members have indicated that the Provincial Strategic Plan, the Vision of the department, positive organizational culture, and Annual Performance Plan are the drivers of the strategy formulation. Five (26%) of the selected

Staff Members have indicated that SWOT Analysis, planning, and monitoring are the drivers of strategy formulation. One (5%) of the selected Staff Members has not responded to this question at all.

4.4.16 What are the outcomes of the drivers of the strategy formulation?

The District Senior Manager (100%) has indicated that the achieved goals and documents are the outcomes of the drivers of the strategy formulation.

Seven out of eight (87.5%) of the Managers have indicated that that the outcomes of the drivers of strategy formulation are long-term objectives and grand strategies which will result in effective performance, value for money and satisfied clients, and improved matriculation results. One (12.5%) Manager has not responded to this question at all.

Few of the Circuit Managers have been able to indicate positively that the outcomes of the drivers of strategy formulation are long-term objectives and grand strategies which will result in effective performance, value for money and satisfied clients. Eight out of twenty- two (36%) of the Circuit Managers have responded positively to the statement and have also indicated that the outcomes of the drivers of strategy formulation could bring satisfaction, improved performance at all structures and ultimately learner performance. Fourteen (64%) have not responded to this question at all.

Most of the selected Staff Members have been able to indicate positively that the outcomes of the drivers of strategy formulation are long-term objectives and grand strategies which will result in effective performance, value for money and satisfied clients. Fifteen out of nineteen (79%) of the selected Staff Members have responded positively to this statement and have also indicated the following as the outcomes of the strategy formulation:- the aligned strategy of the district , proper supervision and control, achievement of the set annual targets, the best service delivery, and improved performance at school level. One (5%) of the selected Staff Members has indicated that nothing becomes an outcome of the drivers of the strategy formulation, whereas, three (16%) of the selected Staff Members have not responded to this question at all.

4.4.17 What are the drivers of strategy implementation?

The District Senior Manager (100%) has indicated that the District Plans are the drivers of the strategy implementation.

Six out of eight (75%) of the Managers have indicated the following: Leadership, Culture, Structure, Resources, Policies, Teaching and Learning as the drivers of strategy implementation. One (12.5%) Manager has indicated that he/she does not understand the question. Whereas, one (12.5%) Manager has not responded to this question at all.

Six out of twenty- two (27%) of the Circuit Managers have indicated that formulated strategic goals and objectives, management (leadership) at all levels in the district as the drivers of strategy implementation.. Two (9%) have indicated that the drivers of the strategy implementation as the capacity to improve, accountability, value for money. One (5%) has indicated that the drivers of strategy implementation are district officials. Whereas, thirteen (59%) have not responded to this question at all.

Nine out of nineteen (47%) of the selected Staff Members have indicated the achievement of set goals and objectives, reports from all sections, proper planning, and teaching and learning as the drivers of the strategy implementation. Six (32%) of the selected Staff Members have indicated the Management at all levels and all staff as the drivers of the strategy implementation. One (5%) of the selected Staff Members has indicated that nothing becomes the drivers of the strategy implementation, whereas, three (16%) of the selected Staff Members have not responded to this question at all.

4.4.18 What are the outcomes of the drivers of strategy implementation?

The District Senior Manager (100%) has indicated that the District Reports are the outcomes of the drivers of the strategy implementation.

Six out eight (75%) of the Managers have indicated that the improved grade 12 results, achievement of set objectives and goals, attainment of vision and mission, implementation of policies as the outcomes of the strategy implementation. One (12.5%) Manager has indicated that

the structures, resources, leadership, and management as the outcomes of the drivers of strategy implementation. Whereas, one (12.5%) Manager has not responded to this question at all.

All of the Circuit Managers are not aware of the outcomes of the drivers of the strategy implementation. Some mention the compliance, reviews, proper implementation of the strategies and attainment of the set standards. Six out of twenty-two (27%) have responded positively to the statement, whereas, sixteen (73%) have not responded to this question at all.

Most of the selected Staff Members have indicated that the reports, attainment of incentives, problems solving, ownership of the district strategy. Fourteen out of nineteen (74%) of the selected Staff Members have responded positively to this statement and have also indicated that the functional Small Business Units (SBUs), achieved goals, feedback, and improved learner performance are the outcomes of the drivers of strategy implementation. Five (26%) of the selected Staff Members have not responded to this question at all.

4.4.19 How does the performance management system help align the strategy formulation and strategy implementation?

The District Senior Manager (100%) has indicated that the performance management system (PMS) helps to built capacity of staff to be able to align the strategy formulation and implementation through contracting with various small business units (SBU) and senior management in the district.

Six out of eight (75%) of the Managers have indicated that the Measurable Objectives of the strategy are translated into the Work plans and aligned to goals and strategic objectives of the organization. One (12.5%) Manager has indicated that it is not yet clear how performance management system helps to align the strategy formulation and implementation. Whereas, one (12.5%) Manager has not responded to this question at all.

Seven out of twenty- two (31%) of the Circuit Managers have indicated that the alignment of the strategy formulation and implementation can be achieved through ownership, monitoring and evaluation and continuous feedback of Key Performance Areas (KPAs) in the Performance

Management Systems (PMS). One (5%) has indicated that it is not known how alignment is being done through Performance Management Systems (PMS) to achieve alignment of the strategy formulation and implementation. Whereas, fourteen (64%) have not responded to this question at all.

Fourteen out of nineteen (73%) of the selected Staff Members have indicated the reward system and incentives, the signing of the performance contracts, the evaluation of the implementation processes, linking goals and objectives of the institution, reports, ensuring that the key objectives are achievable, and to monitor and evaluate the system. Two (11%) of the selected Staff Members have indicated that Performance Measurement System is done for monetary reasons and without being aligned to strategy. Whereas, two (11%) of the selected Staff Members have indicated that there is no link, as there is no strategy for implementation, and one (5%) of the selected Staff Members has not responded to this question at all.

4.4.20 What are the best practices the district can use after the alignment of strategy formulation and strategy implementation?

The District Senior Manager (100%) has indicated that the best practices and strategies the district can use after the alignment of strategy formulation and implementation are periodic implementation of feedback and reviews.

Seven out of eight (87.5%)of the Managers have indicated that the best practices and strategies the district can use after the alignment of strategy formulation and implementation are periodic implementation of feedback and reviews, monitoring, evaluation and control of the impact of the implementation, involvement of lower level employees (for buy-in), reward performance. Whereas, one (12.5%) Manager has not responded to this question at all.

Nine out of twenty- two (41%) of the Circuit Managers have highlighted the following as best practices the district can use after the alignment of the strategy formulation and strategy implementation:-coordination of activities, involvement of all stakeholders in the strategic planning as well as continuous monitoring and support, ensuring that monthly/ quarterly reports

are aligned, sharing of best practices, putting in place controlling and evaluation of strategy implementation, formulate management plan with regard to strategy implementation. Thirteen of the Circuit Managers (59%) have not responded to this question at all.

Fifteen out of nineteen (79%) of the selected Staff Members have indicated the following as the best practices the district can use after the alignment of strategy formulation and strategy implementation:- sustained monitoring and support, drawing of work plans, making follow-ups on meetings and reports, thorough evaluation of Performance Measurement Systems (PMS) reports, resourcing small business units (SBUs) in order for them to function properly, building the spirit of high performance into a culture, compilation of review reports to check whether the set targets are achieved or not, developing a buy-in approach, periodic feedback and reviews. Three (17%) of the selected Staff Members have not responded to this question at all.

4.4.21 What Measures / Key Performance Areas (KPAs) are in place to assess if the implementation of the strategies is on the right track?

The District Senior Manager (100%) has indicated the following as the Key Performance Areas (KPAs) that should be evaluated and controlled to achieve a feedback:
- Leadership and Management, and
- Monitoring and Support

Seven out of eight (87.5%) of the Managers have indicated the following as the Key Performance Areas (KPAs) that should be evaluated and controlled to achieve a feedback:- the core business of the small business unit (SBU) , for example, Curriculum Section- (effective curriculum delivery), Governance-(functional School Governing Body, Representative Council of Learners, and efficient and effective finance committees), and provision of infrastructure, and learner assessment, etc. One (12.5%) Manager has not responded to this question at all.

Most of the Circuit Managers are not aware of the Key Performance Areas (KPAs) to assess if the implementation of the strategy formulation is right on track, as eighteen out of twenty- two (82%) of the Circuit Managers have not responded to this question at all. However, four (18%) have indicated that the Key Performance Areas (KPAs) are leadership and management,

governance and relationships, financial management, curriculum implementation, provision of infrastructure, and learner assessment.

Fifteen out of nineteen (79%) of the selected Staff Members have indicated the core duties, financial and strategic performance, measurable objectives, leadership and management, monitoring and support, learner assessment, quality assurance and implementation of policies, and improved learner and teacher performance. Four (21%) of the selected Staff Members have not respond to this question at all.

4.5 Conclusions

In this chapter, the researcher has presented the findings from the questionnaires collected from respondents. Analysis of data will be presented in the next chapter. The researcher will identify trends, factors and also interpret the findings of the data, including linking the findings with the information from the literature review.

Chapter 5

Analysis and Interpretation of Results

5.1 Introduction

In this chapter, discussions of findings will be presented and in the process link it with the literature review from the previous chapters.

5.2 Analysis of Data

The aim of analysis is to understand the various constitutive elements of one's data through an inspection of the relationship between concepts, constructs or variables, and to see whether there are any patterns or trends that can be identified or isolated or to establish themes in the data.

5.3 Analysis

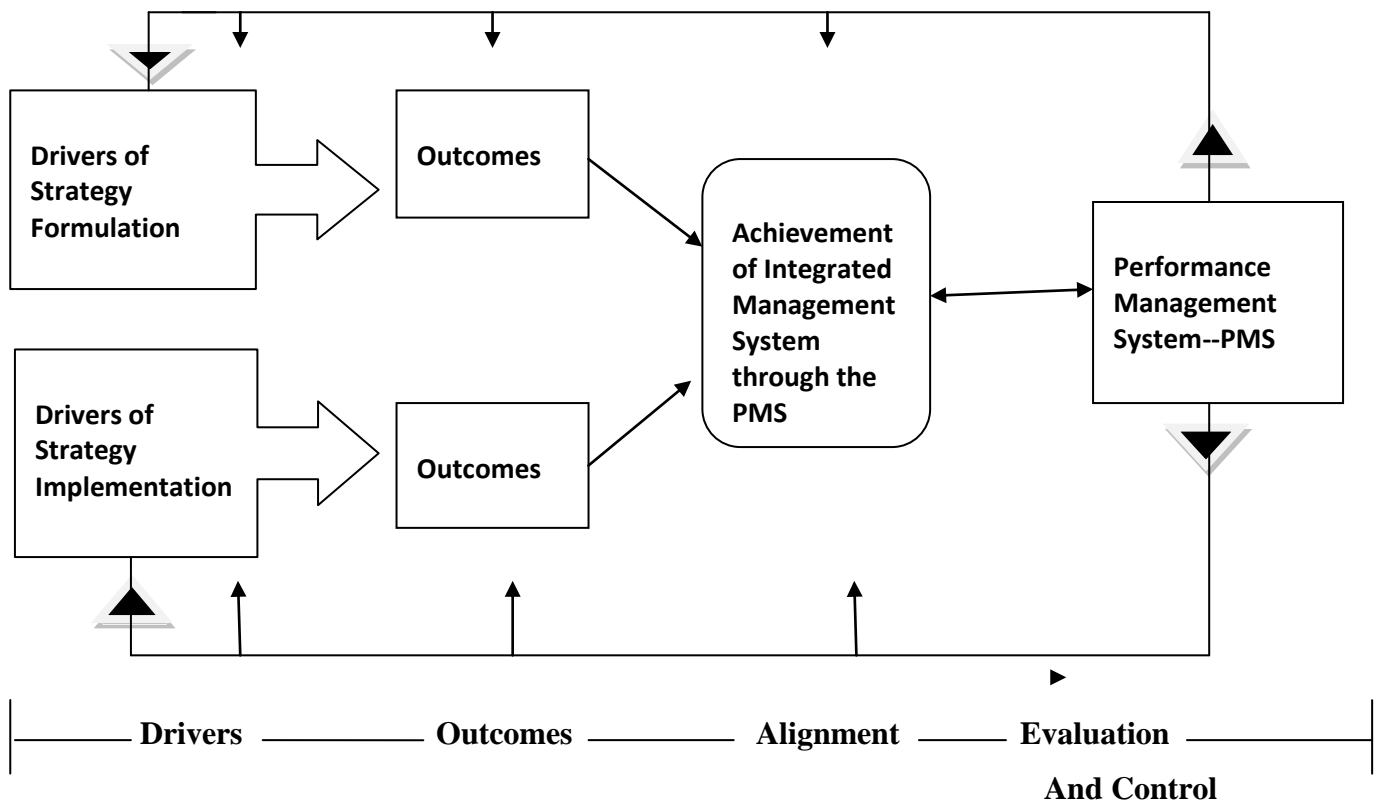The Analysis will be based on the integrated strategic management process framework reproduced below:

Figure 2.2. The integrated strategic management process framework

The District Senior Manager deals with strategies that cut across all the programmes in the District. Small Business Units (SBUs) Managers and Circuit Managers give strategic inputs that affect their small business units (SBUs) to the District Management through Corporate Services. Managers, Circuit Managers, and selected Staff Members implement strategies in their various branches.

The District Senior Manager has indicated the following as the drivers of strategy formulation: planning, monitoring and support, whereas half of the Managers, Circuit Managers and almost half of the selected Staff Members (Page 62) have indicated the Vision and Mission statements, Annual Performance Plans, and Provincial Strategic Plan as the drivers of strategy formulation. The above indicates that there need to be rigorous training in strategy formulation as the District Senior Manager and half of the Circuit Managers who have not responded to this question, indicated otherwise. Managers (75%) have been able to respond to this question by being able to indicate the drivers of strategy implementation, ut Circuit Managers (59%) have not responded to this question. This indicates that the District Management does not speak the same language as the rest, which again calls for the training of all.

 The District Senior Manager, Managers and selected Staff Members have been able to indicate the outcomes of the drivers of the strategy formulation and implementation, whereas more than (70%) of the Circuit Managers have not responded to this question. In the case of the Circuit Managers, more than half did not respond to the drivers and outcomes of the strategy formulation and implementation. This means that they are just summoned to the strategy planning. Now the big question is, will Circuit Managers as strategy formulators and strategy implementers be able to link the two processes? Therefore, the researcher recommends their training to be effected as soon as possible, so that they can be able to link the performance management system and the integration of strategy formulation and implementation.

The District Senior Manager has indicated that the State of the Nation Address by the Minister of Basic education, the Budget Speech by the Member of the Executive Council, and the Provincial Strategic Plan are the sources of strategy formulation. Meanwhile Managers and Circuit

Managers have indicated that The Constitution of the Republic of South Africa, provincial Annual Performance Plan (APP), State of the Province Address by the Premier, Member of Executive Council (MEC)'s budget speech are the sources of the strategy formulation. Other Managers and selected Staff Members have indicated service Delivery Improvement Plan, analysis of grade 12 results, Systemic evaluation, and Overall Performance of Schools as sources of strategy formulation. What comes out clearly is that different levels of management have different understanding of what informs strategy formulation in the district.

The District Senior Manager has indicated that the District Management is responsible for the strategy formulation in the District. Managers have indicated that the Head Office Officials from Strategic Planning Research Unit, District Management, Corporate Services and Circuit Managers are responsible for strategy formulation. Most Circuit Managers have indicated that District Senior Manager, Small Business Units (SBU) Managers, Circuit Managers, Head Office (Provincial) representatives, Social Partners at district level and selected Staff Members from different Small Business Units (SBU) in the district, led by Corporate Services which is tasked to organize, coordinate and consolidate the formulation of the strategy for the district are responsible for strategy formulation. Others have indicated that Schools, Circuits, Circuit Management Committee, and all stakeholders are responsible. Most selected Staff Members have indicated that the district strategy is formulated by the District Senior Manager, Circuit Managers and Small Business Units (SBUs) Managers. One of the selected Staff Members has indicated that it is supposed to be the responsibility of everybody in the district.

What is apparent is that different levels of management have different understandings about who is responsible for the formulation of the strategy. The District, even the management, is not certain who is in charge of the strategy. It seems even at the District Management level, no decision, consciously or unconsciously, have been taken about who should be in charge of strategy formulation in the district. The same trend has been evident in terms of different levels of managers' understanding of their roles in the formulation of the strategy. Managers have indicated that their role is to give inputs to the District Management Team (led by Corporate Services) for inclusion in the strategy formulation of the district. It seems one person, i.e. District Senior Manager, is in charge of the strategy formulation.

5.4 Drivers of strategy formulation

5.4.1 Vision and Mission

Managers who develop and communicate a vision skillfully can make a profound impact, because vision provides focus and direction. Without vision, people are exposed to short-term opportunities that they may feel endlessly compelled to seize. Without focus, the district may never develop a strong distinctive competency. The Vision and the Mission of the Department should be driven by leaders and managers of the department. The Member of the Executive Council as the political head and the Head of Department as the accounting officer should drive the vision and mission of the department.

The District Senior Manager, Managers, and Circuit Managers should provide leadership to the district and live the vision and the mission. In fact, all key stakeholders of the district should be consulted to solicit their buy-in, support and commitment to the vision and mission. All employees in the district should know who is responsible for strategy formulation and the processes that they should undertake to make their inputs. This should be communicated and also be reinforced by the leadership in the district. In that way, they will own all strategies that the district had adopted and show commitment in their implementation.

5.4.2 Strategic Objectives

Various factors should be taken into consideration when objectives are set. Circuit Managers and selected Staff Members, have indicated the need to source inputs from various stakeholders. Processes on how to go about doing that was not clear from the responses to the questionnaires. The other issue which was not clear was how the mandates i.e. State of the Nation Address, State of the Province Address, Member of Executive's budget speech, etc. as identified, are considered when objectives are set.

The District Senior Manager, together with Managers and Circuit Managers should use the district *lekgotla* to set objectives which will assist the district to achieve the set vision and mission of the province. The objectives should be based on the core functions of the Small Business Units (SBU), through the involvement of all stakeholders.

It is also important that objectives should be understood and communicated throughout the levels of the organization. This will assist the organization if they are performing as they should or not. The district can use monthly meetings held between district management teams to discuss and communicate the objectives to ensure that the district objectives are well understood at all levels. Various Managers should also convene small business units (SBU) meetings in order to communicate the objectives further to lower structures in the district. The Corporate Service unit should develop an internal newsletter, which can be published once or bi-monthly to communicate important developments, including objectives and strategies that the district is embarking upon. This will assist in spreading the messages. In this way, lower levels of the organization will then breakdown the objectives into specific targets and different managers at different levels will then be held accountable for attaining them. In this way, a result- oriented climate will be built throughout the district.

5.5 Drivers of strategy Implementation

5.5.1 Leadership

One make-or-break determinant of successful strategy implementation and execution is how well management leads the process. Managers, at all levels, believe the responsibility of implementing the strategies lies with the district manager. For a strategy to be considered effective, a chosen strategy must be implemented successfully. Execution is fundamental to strategy and has to shape it. No worthwhile strategy can be planned without taking into account the organization's ability to execute it. Most Managers at all levels *were unable* to identify the following as key drivers of strategy formulation and strategy implementation respectively:

- ✓ Vision and Mission statements
- ✓ Long-term strategies/grand strategies;
- ✓ and finally the generation, evaluation and selection of strategies**;** *and*

- Resources including budget, human and physical resources
- Legislation which gives mandates and powers
- Management processes
- Organizational culture
- Leadership

- Performance management system

As all managers have a challenge of identifying the strategy drivers, the integration of strategy formulation and implementation would be a nightmare to the district management as a whole. Therefore, leadership of the district has to be trained in order to have synergy in the execution of formulated strategies. However, one must emphasize that success in the organization is not limited to leadership only. It involves team effort. Greater Sekhukhune District Department of Basic education, Limpopo Province, at the moment, lacks team effort because of the bureaucratic nature of the district. Most Small Business Units (SBUs) operate in silos from each other. There is a need for the leadership to start teambuilding exercises to indicate to everybody how pieces fit into a whole to achieve the district's formulated objectives.

5.5.2 Organizational culture

Thompson (1996:78) states that, 'Culture is reflected in the way people in an organization perform tasks, set objectives and administer resources to achieve them.' The author further states that, 'culture affects the way that they make decisions, think, feel, and act in response to opportunities and threats.' One can define a strong culture as an organizational culture with a consensus on the values that drive the company and with an intensity that is recognizable even to outsiders. Ehlers et al (2007:225), and Thompson and Strickland (2001: 415) emphasize that, 'in strong organizational cultures, values, norms, and beliefs are deeply ingrained and difficult to eliminate.' Pearce et al (2005:342-343) postulate that, 'in shaping organizational culture, leaders know well that the values and beliefs shared throughout their organization will shape how the work of the organization is done. The authors' further state that reshaping the organization's culture is an activity that occupies considerable time for most leaders. In most cases leaders use reward systems, symbols, and structure among other means to shape the organization's culture.'

Most managers at all levels have indicated that they do not understand the culture as in the organizational culture, but few have indicated that the culture is negative as there is no support of the new District Senior Manager, submission are always late in case the small business(SBUs) units submit. However, because of personal agendas, self-centeredness, and bureaucratic set of government machinery, organizational culture remains a challenge and barely exists. The district management must realize that organizational culture, if well developed, can be useful to the

advantage of the district. A series of motivational services can assist to increase productivity among employees. In the same vein, organizational culture can also have a negative impact on the implementation of the strategy if left unattended.

Greater Sekhukhune District Department of Basic Education needs to change its culture in order to create an environment that is conducive to staff to function. At the moment, some the respondents have indicated that the culture is negative and encourages non-compliance to legislative guidelines. There is no positive move by the district to improve the organizational culture, as there are no efforts to inculcate the culture of rendering the service selflessly. A tight strategy-culture 'fit' supports strategy implementation in the sense that it creates structure, a value system and informal rules that align 'the way things should be done around here' with strategy implementation processes.

5.5.3 Organizational Structure

According to Thompson et al (2001:319), 'Every firm's organization chart is idiosyncratic, reflecting prior organizational patterns; varying internal circumstances execute judgments about reporting relationships, and the politics of who gets which assignments. Moreover, easy strategy is grounded in its own set of key success factors, and value chain activities. So, a customized organizational structure is appropriate.'

Managers at all levels have indicated that they believe the roles are vague and not well-defined, resulting in non-compliance to legislative guidance. They believe that roles and responsibilities are defined through policies and organizational structure. One selected Staff Member has indicated that there should be proper resource allocation in order to achieve the implementation of the strategy successfully. Circuit Managers, in particular, do not want to respond to this question, because responsibilities are deliberately overlapping, especially at circuit level, hence others feel responsibilities are not well defined. Organizational structure assists in clarifying roles and responsibilities.

5.6 Conclusions

The key element of an organization is not a building or a set of policies and procedures; organizations are made of people and their relationships with one another. The structure will assist in defining the relationships, roles and responsibilities of the employees in the district. It will also help in resource allocation in terms of strategic goals and objectives.

In the next chapter the researcher will attempt to present the end product of the research in relation to the results, conclusion and recommendations and how they relate to the literature review and theory in strategy formulation and implementation

Chapter 6

Conclusions and Recommendations

6.1 Introduction

This chapter will attempt to present the end product of the research. The main findings obtained will be discussed by drawing together the results from the previous chapters. The relationship between the results and conclusions and how it relates to the literature and theory in strategy formulation and implementation.

6.3 Recommendations for the Managers

The analysis and interpretation of the responses has prompted the researcher to recommend the following:

1) The managers and selected staff members have indicated that small business units are not coordinated in executing formulated strategies. The district must make sure that all downstream units are moving in the same direction. Align the strategies of the small business units, circuits and schools first, as they ultimately need to be sufficiently backed in the district. In addition to orienting the downstream units, the district needs to resolve goal conflicts between units at the same organizational level. Successful strategy implementation depends entirely on cooperation among district units (Small Business Units at district), functional (Circuits) and divisional (schools) managers in an organization.

2). District Senior Manager, Circuit Managers, , and Managers have indicated that the district need to align formulated strategies in order to achieve goals and objectives. To optimize strategy alignment, every team in the district must communicate on the same frequency. This means that all units need to speak the same strategy language and must have the same strategy dictionary. There is no longer need to operate in silos. Team-building should be the norm to all district staff members.

3). As indicated in the analysis of results that most Managers, the District Senior Manager and half of the Circuit Managers have a challenge of identifying strategy drivers and their outcomes, the researcher recommends that there should be a rigorous training on the drivers of strategy

formulation and implementation and their outcomes; and how to align/integrate the two processes, which could be enforced through performance management systems.

4). All employees of the district should be involved in the process of strategy formulation. This has been indicated by a selected staff member who was involved in the strategy planning of the district. Prior to strategy planning, every unit should consult its staff for inputs to the units' Annual Performance Plan's (APP's) objectives. The indication by a selected staff member is supported by Thomas et al (2003:245) and David (2009:88) when they stated that stakeholders should be consulted when developing the vision and mission statements of the organization; hence, the consultation will assist in the ownership of the process by all stakeholders involved resulting from the exercise.

5). From the observation the researcher has made, the district involves district senior manager, circuit managers, managers, and other selected staff members based in various small business units (SBUs) at the District to do their strategy map, balanced scorecard, and strategic action program in one sequence. The district can achieve alignment through discussions and adjustments during multiday workshops or *via* objectives and metrics defined before or after the cascading exercise and deployed from top down. Viewpoints must be discussed, compared, and synchronized with the strategic perspectives of other units, and strategy contents (based on strategy maps) must be coordinated before balanced scorecard can be derived and strategic action programs can be conducted in various units. In the cascading process, local management teams can adapt strategic objectives from the district strategic map; this will alleviate branches working in silos.

Strategic Management, if applied correctly, can assist the Greater Sekhukhune District Department of Basic Education to achieve its goals and objectives in an efficient and effective manner. All that is required is to adopt an integrated approach to strategy formulation and implementation, taking into consideration all the factors that are essential for strategy formulation and strategy implementation, and their outcomes.

The benefits of an integrated approach on the alignment of strategy formulation and implementation by Greater Sekhukhune District Department of Basic Education, Limpopo Province to achieve its formulated goals and objectives.

The strategy alignment will help Greater Sekhukhune District through structural content or completely flexible strategy process that:

- Orients downstream units,
- Places strategy execution within a formal planning and measurement structures,
- Resolves goal conflicts between Small Business Units (SBU)),
- Optimizes strategy alignment through every team communicating on the same frequency,
- Consolidates strategic ideas,
- Synchronizes or aligns strategies of different organizational units, and
- Gives proper consideration to consensus and commitment among key decision makers.

Finally, strategy refinement and execution represents a balance between creativity and analysis. If the entire process is too unstructured, then the District runs the risk of missing the essential considerations. But if the process is overly structured, then truly creative ideas are suppressed, thus compromising the core of successful strategies. Therefore, a buy-in and consensus of all stakeholders should be the norm.

Conclusion

The district must ensure that its business units (Small Business Units, Circuits and Schools) are collectively more successful than if they were acting individually. To create additional value through parenting advantage, the district must clearly define its role and strategic priorities to optimize the competitive advantage that lies within small business units, circuits, schools and people.

The report concludes that in order to approach strategy formulation and strategy implementation in an integrated manner, the following should take place:-

1) Managers and staff members who are responsible for strategy implementation should also be involved in strategy formulation processes;

2) Organizational culture should be changed to create a conducive environment for the managers and the employees to be motivated to render quality services at all service points;

3) Leadership and management to guide vision and mission of the district;

4) Organizational structure to 'fit' implementation of strategies for efficiency and effectiveness of the integration of strategy formulation and implementation to achieve formulated goals and objectives.

Integration is an important element in strategy formulation and implementation, providing a vital tool for resource allocation to avoid wastage and duplication. Similarly, not only is the integration process of key drivers important for strategy formulation and implementation, but such a process must provide space for feedback, the demarcation of power and responsibilities and accountability and the provision of resources, if strategy formulation and implementation is to succeed and have the desirable impact.

The following general conclusions can be reached:-

- Organizations should be able to adjust their processes when internal and external environment change to accommodate strategic shifts.
- Management should develop effective communication strategy to disseminate information at all levels of the organization.
- People who are responsible for strategy implementation should form part of the strategy formulation processes for better alignment and integration of the two processes.

Without proper strategic leadership, a shared sense of vision in order to direct strategy cannot be achieved. Employees can be tempted to do their own things guided by personal growth rather than by the goals of the organization. Following from the analysis of data collected, the district management has a challenge of identifying the drivers of strategy formulation and implementation and their outcomes. This calls for rigorous training of the district management and the inclusion of all stakeholders in the whole process.

Highlights of the Research

The researcher has gained valuable experience during the literature review and going through the questionnaire. Literature on strategy management (formulation, implementation and control) has been easy to access and there are many authors who wrote on the subject. The downside of it is that most of the literature applies more to the private sector than the public sector. There are few authors who have written on strategy formulation and implementation in the public sector. As a result, some of the concepts, which apply to the private sector, have to be applied to the public sector. The process of interacting with managers at all levels and selected staff members has afforded the researcher more opportunities to gain more in-depth knowledge of how the public sector implements its strategies and what needs to be done or improved in order to integrate the different approaches to strategy formulation and implementation. After understanding the frustrations, the researcher's enthusiasm has been renewed to read even more to assist in developing models on how best to improve the situation. As a result, the researcher has gained valuable knowledge and in-depth understanding of strategic management i.e. from formulation, implementation, and evaluation and control and how to link and integrate them.

6.2 Attainment of Research Objectives

The objective of the research was to explore best practices and strategies the Greater Sekhukhune District Department of Basic Education can use to integrate the strategy formulation and implementation after the alignment of strategy formulation and implementation. To attain this objective, researcher had to find out what the key drivers of strategy formulation and implementation are and their outcomes and how they should be integrated. After thorough analysis and interpretation of the data, the researcher has been able to conclude that vision and mission statement, long-term strategies \ grand strategies; and finally the generation, evaluation and selection of strategies are the outcomes of the drivers of strategy formulation. The literature review has also indicated that leadership, organizational culture, organizational structure, policies, short-term objectives, and resource allocation are the key drivers of strategy implementation and how each factor is emphasized, will depend on the strategic goals and objectives of the organization.

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