THE IMPLICATIONS OF THE OUT-OF-FIELD PHENOMENON FOR EFFECTIVE TEACHING, QUALITY EDUCATION AND SCHOOL MANAGEMENT

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Abstract
The out-of-field phenomenon, that is, the situation where teachers teach outside their field of expertise, adds complexity to the education environment and affects learners, colleagues, parents, governing bodies and school management. It puts extra strain on school management’s responsibility to provide quality management and jeopardises effective teaching and quality learning. This article examines the implications of the out-of-field phenomenon for school management. An empirical investigation entailing the use of a qualitative approach was employed for the study. Data were gathered through semi-structured interviews with selected participants who shared their experiences of the phenomenon. Findings indicated that the out-of-field phenomenon and its implications should be recognised in order to provide effective and quality teaching, substantial teacher support and sufficient staff development programmes.

Key phrases:
Out-of-field phenomenon; outside field of expertise; hire for fit; staff induction; human resource management; teachers

Introduction
Transformation in education ensures progressive development and avoids stagnation. Educational transformation to provide quality and equity in education requires suitably trained teachers assigned to appropriate grade levels and subjects (Ingersoll, 2001:1). However, transformation in education may create new needs in schools which result in teachers’ being ‘misassigned’ to teach subjects for which they are not technically prepared to teach (Ringstaff & Sandholtz, 2002:812). When there is a shortage of certain teachers it is typical to replace those teachers with ‘out-of-field’ teachers (Hill & Willie, 2003:6). The widespread occurrence of this phenomenon draws attention to its implications for quality education. Research consistently shows that there is a positive relationship between teacher
academic proficiency and learner achievement (Goldhaber & Anthony, 2003:4; Ringstaff & Sandholtz, 2002:813).

The phenomenon of out-of-field teaching, where teachers are placed in teaching positions in which they have to teach subjects outside their field of expertise, occurs in public schools as well as independent schools in South Africa, either as a result of managerial decisions taken by the principal and the school management team or through recruitment procedures. Unsuitably assigned teachers are often a “quick fix” solution to teacher shortages and indicate a poor needs analysis by school management (Cohen-Vogel, 2005:15, 16, 17).

Teaching out-of-field subjects has been a large problem in the USA, especially in maths and science (Baker & Smith, 1997:32; Brewton, 2003:10; Issue Brief, 2005:2). Podgursky (2006:27) stated during the school year of 2002 and 2003, only two Missouri K-12 school districts had no courses taught by inappropriately qualified teachers. Jerald (2002:3-5) also refers to unacceptably high rates of out-of-field teaching in the state Georgia: 37 to 40 percent of teachers teaching math had no suitable qualifications, 27 percent of science teachers and 22 percent of English teacher are assigned without proper qualification. The out-of-field teachers unfortunately ‘skyrocketed’ in high-poverty and high-minority schools (Brewton, 2003:10; Issue Brief, 2005:2). As a result of this these students receive poor teaching in all subjects which tends to widen the achievement gap (Jerald & Ingersoll, 2002:1).

Against the background of these figures and the fact that there are currently no statistics available for the occurrence of the out-of-field phenomenon in South Africa, documentary surveys at specific South African schools on the occurrence of the out-of-field phenomenon were done. These surveys involved all teachers at specific schools. It revealed disturbing evidence that the phenomenon may be even more widespread than assumed. The survey for the pilot study showed that 100 percent of teachers in the senior primary and secondary phases taught subjects outside their field of qualifications or training. In some cases these were major subjects and in some only minor subjects but every staff member had experience of the out-of-field phenomenon.

Principals and school management regularly find themselves scrambling against deadlines to fill classrooms with qualified teachers (Podgursky, 2006:29). These unsuitable placements of teachers have grave implications for the effectiveness and quality of teaching (Harley, Bertram & Mattson, 1999:173). Unsuitable placements also have far-reaching implications for education management, such as their effect on the “fit” between policy and practice in the education process. The out-of-field phenomenon affects the successful implementation of
curricula and the effectiveness of different management groups and other role players, such as governing bodies, school management, teachers, learners and parents (Creswell, 1998:96; Harley, et al, 1999:173). Moreover, the implications of the out-of-field phenomenon underline the importance of hire-for-fit procedures when assigning teachers.

**Background to the out-of-field phenomenon**

Ingersoll (1998a:773) and Olsen (2000:12-16, 18) state that out-of-field teachers are well trained teachers, but are placed in teaching positions that do not match their training, specialised qualifications, core knowledge, skills, beliefs, values or approach. They adapt to difficult situations by developing teaching techniques and characteristics, which may at first sight seem acceptable to their superiors. However, in order to survive, competent teachers later develop into uncertain textbook followers, rather than motivated leaders and developers.

Out-of-field teaching is not an unusual aberration nor is it restricted to a few subjects (Chaika, 2000). Growth in learner enrolment and a high teacher attrition rate are some of the causes of the out-of-field phenomenon (Chaika, 2000:4). Sometimes curriculum changes oblige teachers to teach subjects for which they are not qualified. Teachers have the responsibility to provide their learners with effective and quality teaching. Furthermore, academic success is only possible through teaching by specialist teachers who are teaching at an appropriate level of difficulty and who provide learners with tasks that are clearly taught and promptly conceived (Ingersoll, 1998b:10). Harley, et al, (1999:36) and Ringstaff and Haymore (2002:815,819) believe that learners react positively towards teachers who are specialists in their field since learners “trust” their teaching skills.

The “fit” between policy (what effective teachers should be doing) and practice (what effective teachers are actually doing) determines teachers’ quality (Harley, et al, 1999:173). The out-of-field phenomenon makes it very difficult for teachers to achieve a “fit” between policy and practice. The “fit” between policy and practice not only influences the teachers’ quality but also controls the quality of teaching because teachers play a crucial role in the teaching process. Clearly, then, out-of-field teaching can result in poor teaching practices and uneven and inequitable provision of teacher resources. It is argued that research into this phenomenon leads to a better understanding of the impact of the out-of-field phenomenon on quality education. In addition, it provides a better understanding of the impact of out-of-field placements on the confidence of teachers. A poor level of confidence is common among such teachers and further affects their effectiveness as teachers.
Research clearly demonstrates that teacher quality is the most important factor in learners’ learning (Harley, et al 1999, 149). Therefore, assigning any teacher to teach any class is not effective management and does not comply with the requirements for effective and quality teaching. Evidence from research (Chaika, 2000:5; Olson, 2000:12-16) shows that learners whose teachers know their subjects perform better than learners whose teachers lack core knowledge of the subject they teach. Out-of-field teachers struggle to be instructionally effective and aware of learners’ diverse needs. This highlights the need for research into the responsibility of school management to implement a hire-for-fit practice as a possible measure to prevent teachers from being placed in unsuitable positions where they are professionally vulnerable.

The purpose of this article is to describe the implications of the out-of-field phenomenon for school management by means of the above-mentioned literature overview and the findings of a qualitative study. The latter reports on the perceptions of teachers currently teaching in out-of-field situations in South African schools as well as the perceptions of school managers and parents.

**Research design**

A qualitative research design was used to investigate the out-of-field phenomenon and its implications for school management (Gall, Gall & Borg, 1999:289; Schutte, 2000:9). The lack of research in this field made this an exploratory research project and literature available on the phenomenon was limited. This design provided an opportunity to investigate how principals, staff and parents experienced the out-of-field phenomenon. The research highlighted the shared perceptions and experiences of teachers involved in out-of-field teaching and its ripple effect on all role players in the learning environment. The research also focuses on the substantial influence the phenomenon has on quality education and effective management in the development of quality teaching.

- A pilot study design was done in a former Model C school before the interview schedule was finalised (Wengraf, 2001:4). Eight participants from this school took part in the pilot study. The pilot study revealed that the participants (the principal and deputy principal, two teachers for the senior secondary phase, two teachers from the senior primary phase and two parents) had different concerns about the out-of-field experience, depending on their personalities and their circumstances (Du Plooy, 2000:176) and provision was made for this in the final interview schedule.
Purposive and convenient sampling was used to identify schools in rural and subrural areas (Strydom & Delport, 1998:328; McMillan & Schumacher, 2006:319). During the data collection process participants identified other staff members who had personal experience of the out-of-field phenomenon. This is known as snowball sampling. The sample involved experienced, well-qualified teachers in out-of-field positions with a view to gathering evidential information about their actual teaching environment. Five schools that were recognised in their communities as schools with a positive academic culture and were seen by the community as generally “successful” were selected. The criteria for the selection of schools were that they should be:

- schools where teachers do not experience major disciplinary problems
- schools where the focus of role players was on the creation of a strong academic environment;
- schools to which it would be possible for the researcher to return more than once

Patton’s typology of randomised and purposive sampling was applied (Patton 2002: 102; Wengraf, 2001: 96,102) in choosing the fourteen information-rich cases that were used in this study (Table 1).

Table 1: Participants’ profiles
The data-gathering strategy used was semi-structured interviewing. The research questions covered in the interviews were the following: What are the implications of the out-of-field phenomenon for effective and quality teaching? How do teachers and principals understand teaching outside their field of expertise and how do they see its impact on quality education and management? The interviews provided flexibility, depth and clarification of data and allowed effective probing to obtain richer data on the participants’ level of knowledge (Pillay, 2002:12; Wengraf, 2001:194). The interview schedules for semi-structured interviews improved the trustworthiness of the research as a result of the consistency obtained through this interview instrument. After twenty-two interviews had been conducted the data reached saturation.

In the five schools in the study, the principal or deputy principal, teachers (including both subsidised/non-subsidised teachers and teachers of the opposite gender) and parents were chosen. The focus in the sampling process was on participants with experience of the out-of-field phenomenon who were willing to share their perceptions and inner feelings.
The tape-recorded interviews were transcribed and reviewed repeatedly to extract as much information as possible (Greeff, 1998:298). This was done after reading all the comments from the participants in order to identify the data in a pure form. Significant comments were grouped into subcategories and units of meaning were put into these subcategories (Johnson & Christenson, 2000:436). The data analysis was successfully concluded when the key features of the implications of the out-of-field phenomenon for school management and quality teaching clearly emerged. The major themes of the out-of-field phenomenon are presented in Figure 1 and are further described in the ensuing sections.

**Figure 1: A diagrammatic representation of the out-of-field phenomenon**

After conducting twenty-two interviews (Table 1) the researcher found that data had reached saturation.

**Results**

The findings reveal the serious implications of this multifaceted phenomenon for school management and also show how little is known about it. In essence participants experienced the same kind of problems although they described their problems differently. The key results are summarised under the following headings:

The out-of-field phenomenon and the teacher

Teachers, who form part of the out-of-field phenomenon, struggle to teach effectively, which influences their perception of their own professionalism, quality teaching and the extent of the success of their development in teaching as a profession.

*Emotional and physical stability*

A participant stated, “I feel worthless in everything I do.” The out-of-field experience affected the perceptions teachers had about themselves, their abilities and their effectiveness as teachers. One participant cautiously disclosed, “Self-control is a very sensitive point for teachers in the out-of-field phenomenon. Despite all our hard work, dedication and the long hours we spent on these subjects, we still feel unsatisfied and disappointed with our competence and effectiveness. I easily lose self-control.” Another participant stated that feelings of disappointment force teachers to reflect negatively on their teaching career: “They [teachers] have negative feelings towards education as a career and would prefer to quit and rather do something else.”

Some interviews revealed a range of disturbing emotions such as feelings of inadequacy and stress.
• *Feelings of inadequacy.* Feelings of inadequacy lead to constant negative reflection, as one participant explained. “When a teacher starts feeling unsuccessful or learners do not have enough respect for him or her, they become uncertain about everything that has to be done.” Another teacher expressed a sense of hopelessness: “I am a disaster. I am pathetic.”

• *Experiencing stress.* The desire to maintain high levels of effectiveness places pressure on teachers. Out-of-field teachers usually have previous experiences of successful, effective teaching and now find themselves feeling worthless, out of place and frustrated. One participant tearfully admitted, “Actually, we are out of field, out of everything, out of self-confidence… I am never in total control. My situation causes me to set fourteen different examination papers for one exam. It just becomes impossible when you teach six different learning areas, all of which are out of field, every subject’s administration, assessment and regulations are different…” Another teacher added, “Teachers’ self-esteem suffers while we try even harder to cope. More preparation, more administration and a bigger effort with classroom management are needed in an out-of-field situation, which result in extreme feelings of pressure.”

Teachers’ critical evaluation of their own teaching left them dissatisfied with their situation and often also influenced their relations with colleagues, parents and learners.

*Relations with role players*

Teachers felt that they were on their own and detached from the rest of the role players. One teacher declared, “School management does not support teachers who are caught up in the out-of-field phenomenon. Teachers take responsibility for their own training and lean heavily on successful colleagues.” Even experienced teachers felt unappreciated, unsuccessful and mismanaged because of the out-of-field phenomenon’s impact on their effectiveness. A deputy principal elaborated, “I have no peace of mind that I am actually teaching the learners what they need to know in order to make the subject their choice for further career training.”

Teachers want to feel part of the team and to be recognised as professionals. In order to gain the respect of other role players, they resort to various coping mechanisms.

*Coping mechanisms*

The out-of-field phenomenon often becomes unbearable and teachers adopt coping mechanisms in an attempt to appear more competent. Teachers try to hide the fact that they are battling and that there is a lack of discipline in the classroom, hoping that no one else will see the dilemma they find themselves in.
One teacher said that the lack of support from management put the out-of-field teachers in an undesirable situation, leaving them to make their own plans to cope, “Teachers, because of the ‘check-mate’ situation in which we find ourselves, would do ‘things’ they know are wrong but because they have no other solution they would grasp anything to show that they are coping with the out-of-field phenomenon and are even successful.” As part of the attempt to protect their professional image, teachers keep an unnatural distance from the learners. Unfortunately this situation leaves the learners without the necessary in-depth knowledge of the subject to be able to apply problem-solving techniques.

Other participants’ self-empowerment strategy was to work harder, put in extra hours and carry an extra financial burden to obtain resources to better their core knowledge, while constantly being exposed to the criticism of the community because of poor grade 12 results. Teachers take decisions involving empowerment into their own hands, as one teacher explained: “The only way I could survive the situation was to work long hours and to ask specialist teachers from neighbouring schools to help me.”

In an environment of educational change and transformation, out-of-field teachers face difficulties as they try to maintain some level of effectiveness in their teaching.

*Curriculum changes and effective teaching*

Out-of-field teachers who are trying to manage an unfamiliar subject effectively are faced with a huge task. Teachers need time to adjust to their new teaching situation, as a teacher explained: “When any teacher is newly appointed there is a period of time in which he or she is ineffective. When a teacher is appointed in an out-of-field position the period of ineffectiveness may be longer.” Ineffective teaching impacts negatively on the quality of education in South Africa. A deputy principal explained that he works hard and his classes are filled with the learners’ pieces of art but he is still not sure that they have really acquired a core knowledge of art.

Another teacher described a similar experience when teaching grade 12 maths. He said, “I explain and explain but the learners do not understand the work. I even teach mathematics on Saturdays because I can’t finish the work. I have to explain over and over again…the learners are starting to hate maths.”

Teachers teaching outside their field of expertise perceive their dilemma to be the result of poor decisions by school management.
Perceptions of management

Teachers view the “quick-fix” filling of vacancies as the reason for many related problems. As one teacher explained, “School management does placements and then leaves teachers to themselves.” Another teacher added, “The out-of-field phenomenon is the reason why management’s gears are not working as smoothly as they are supposed to.” Teachers also feel they get no support from management and other staff fail to understand what they are going through. A teacher explained, “Once I was in the situation, I was on my own. You either swim or drown!”

Teachers are concerned about the fact that school management does not involve teachers in needs analyses, support programmes and decision making in order to find ways to sustain the quality of their teaching. They feel that they are part of an institution but are frequently neglected by management and the organisational structures surrounding them. Teachers also feel isolated when they are unable to contribute to decision making. Teachers agreed that management is unaware of their needs and the impact of the out-of-field phenomenon on the learning environment. One teacher explained, “No one really knows how much you suffer. If you look for sympathy from the principal, he will just say, ‘Mrs. X, keep your eyes shut and just carry on. There is no one else’.”

Thus, management appears to be reluctant to accept responsibility for the impact of the phenomenon on the quality and effectiveness of teaching and on the school community.

The out-of-field phenomenon and management

Participants agreed that, in order to ensure the empowerment of teachers, school management should know how their own interpersonal behaviour within the phenomenon affects the effectiveness of both individuals and groups of out-of-field teachers.

Managing the out-of-field phenomenon

Most teachers felt that leadership involves inspiration and motivation. However, a principal felt that because of the out-of-field phenomenon he was unable to provide these aspects of leadership. “As a result of redeployment, I have to place these teachers in positions they have no training or expertise in.” This often has a negative impact on the relationship between the principal and staff members. One principal stated, “Tension builds up between the out-of-field teacher and management due to constant reprimands.” Moreover, a teacher stressed the importance of positive intervention by school management if novice teachers who have negative experiences are to be retained in the profession.
It is important that management makes sure it understands the needs of teachers in the out-of-field phenomenon in order to develop quality and effective teaching. A basic assumption of school management is that most staff members are content with the lack of opportunity to exercise their decision-making rights. This assumption highlights poor communication within the school environment regarding the out-of-field phenomenon. School managers assume that their main responsibility is to generate and sustain the culture of the school and make decisions accordingly without necessary input from staff members who are affected by the out-of-field phenomenon.

Secrecy surrounding the out-of-field phenomenon
Teachers noted that secrecy surrounding the out-of-field phenomenon prevents them from receiving support from colleagues and the parent community. Colleagues at the same school sometimes do not even know which of the staff members are affected by out-of-field teaching. One teacher explained that a collegial atmosphere reduces pressure but also acknowledged the tension the phenomenon can cause in the area of group attitudes, “It stimulates a negative feeling towards teaching, colleagues, and the top management.” The out-of-field teacher may affect the formation of strong teaching teams, as another teacher declared, “The solidarity among colleagues has definitely been influenced by the out-of-field phenomenon. It is difficult to form a support framework if teachers are being moved around different out-of-field subjects the whole time.”

Both teachers and parents feel that open discussion of the phenomenon would benefit the learners. Where role players are unaware of or reluctant to acknowledge out-of-field teaching, healthy subject development is impeded since the phenomenon decreases the opportunity for healthy subject discussion and impacts on the development of a positive teaching context.

The out-of-field phenomenon within the school
Participants also described the influence the out-of-field phenomenon has on sound relationships with other role players in the school. Both principals and teachers have a need to be recognised and respected by superiors, learners and parents. A teacher stated, “We are not here only for ourselves but for each other. We need each other to let it work.” In reality this does not happen. “Everyone is for himself. You are left on you own and you have to carry on.”
The school as an organisation

The negative perspectives which develop as a result of out-of-field situations influence the school. Unfortunate incidents resulting from the ineffectiveness of out-of-field teachers create an unpleasant organisational climate within which role players find it difficult to see themselves as part of the team. On the other hand, a pleasant climate enhances the commitment of the entire school community. A teacher interpreted the influence of the out-of-field phenomenon as follows: “The phenomenon may have a negative influence on the loyalty of staff members because it leaves them feeling unsettled, unsafe and uncertain.”

Experiences of instability, constant change and ongoing staff evaluation procedures make staff members in the out-of-field situation extremely sensitive to criticism.

The school community

Various role players in the school are affected by the out-of-field phenomenon.

- **Learners**

Some learners with an excellent academic record feel insecure with an out-of-field teacher in their classroom. These learners and their parents would prefer the school to be more open about the situation. A teacher said, “They [learners] see that you struggle and this prevents them from believing in you and in what you tell them. They will discuss your incompetence with their friends and at home.” Learners may make fun of a teacher in an out-of-field position. If they achieve poor academic results, they blame the teacher, even though there is a possibility that they, themselves, may not have been working effectively. A principal explained, “Learners pick up uncertainties from the teacher immediately. They realise that he or she is not properly qualified and usually they misuse the situation.”

Learners may also be party to discussions at home in which incompetent teachers are criticised. Clearly parents appreciate a suitably qualified teacher.

- **Parents**

A participant stated the following: “Parents are already watching us with a negative eye. If they know that we are not qualified for the subjects we teach, it will be even worse. They will look over our shoulders all the time, trying to tell us what to do.”

Parents are concerned about the influence of the phenomenon on class management such as the maintenance of class discipline and the creation of a wholesome learning atmosphere. They feel it is their right to know exactly what the situation in the classroom is and that the
school has an obligation to inform them so that they can take the necessary precautions. Parents feel that the implications of the phenomenon deepen when learners have an out-of-field teacher in one subject for two to three consecutive years. Home-school communication about academic matters involving children’s development should be an integral part of the school management and the governing body’s responsibilities. Parents also feel that discipline and trust between teacher and learner are severely influenced by the out-of-field phenomenon. One parent argued that she experiences the out-of-field teacher as a threat to the image of her children’s school and its reputation. On the other hand, teachers doubt parents’ real intentions. As one teacher explained, “Parents believe teachers are the ‘masters of everything’ and should answer to the sport, academic, guidance and pastoral needs of learners.”

Positive parental involvement in these circumstances is needed to ensure that learners maintain good results in spite of the out-of-field phenomenon. But the contrary is often the case and parents often become more and more critical of the teachers and the school governing body.

- **School governing body**

Governing bodies have to deal with many different aspects of schooling in their endeavour to lead the school as a successful, functional academic institution. Participants agreed that recruitment, placement and assignment of suitably qualified teachers are important tasks that usually rest on the shoulders of the governing body or principal. A teacher disclosed, “Because of their lack of knowledge related to this field, they easily make decisions from a financial point of view instead of an educational point of view.” Another teacher added: “Members of governing bodies are not always aware of the psychological implications of the out-of-field phenomenon because they usually have no educational qualification or teaching background.”

Participants stated that the level of assistance from and involvement of governing bodies can make or break the school’s learning culture. The important role of leadership, according to one participant, is to take the correct decisions in order to improve learning and teaching.

**Conclusions and recommendations**

Inappropriately assigned teachers may have little chance to develop into learning-community shapers and this undermines both effective teaching and the right of learners to quality teaching. The recommendation is that, in order to maintain effective education, schools should focus on their customers, that is, learners and parents. This recommendation underlines Steyn’s (2002:109) suggestion that schools should have a clear understanding of
their customers and should strive to meet their needs. In order to meet these needs, school management should focus on the following:

*It is recommended that school communities become involved in forum discussions where they have an opportunity to discuss problems such as the out-of-field phenomenon and its impact on the learning environment.* School management and parents need to pay attention to the importance of their interdependence and to cultivate a sound relationship. Although they realise that they should work as partners, respecting each other’s roles and competencies, there are often major differences in the way the parties perceive their roles with regard to the out-of-field phenomenon.

*School management should inform parents about the out-of-field phenomenon so that they can address related issues together.* Schools should have a cohesive culture – a shared sense of purpose and community among parents, teachers and learners. Cooperation between the home and the school has a positive effect on education and creates a secure environment in which effective learning can occur. If parents are seen as partners in education, they can help to supply the support required by the department, the principal and the teachers, which is often lacking. Effective organisational structures where all role players are informed about the implications of the phenomenon present the only way to prevent the out-of-field phenomenon from escalating.

High-quality teaching should be the aim of all in-service programmes where the individual teacher attends not only to subject knowledge but also to time management, class discipline and class management.

*Principals, district and circuit managers are advised to keep up-to-date records of the out-of-field phenomenon at every school in order to monitor and address the phenomenon.* The information may assist the school management to keep a watching eye on teachers’ development and to offer appropriate support when necessary.

*In-service programmes should be aimed at subject matters, classroom management techniques and conferences on new curriculums (Lampert, 2000:88) in order to maintain quality education.* The school management is advised to avoid the possibility of attracting programme problems such as:

- workshop leaders without any experience of the teachers’ circumstances
- unduly large groups
- participants at different levels of experience combined in one workshop group
- lack of analysis of teachers’ concerns before in-service programmes are compiled

Once the school management has a proper picture of what is needed to improve teaching quality of these teachers, they can apply specialist teachers as staff developers. High quality teaching should be the aim of all in-service programmes where the individual teacher attends not only to subject knowledge but also to time management, class discipline and class management. They are therefore in the best position to help design and shape the curriculum.
Bibliography


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<tr>
<th>Participants</th>
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Out-of-field phenomenon and the educator

- Emotional and physical stability
- Relations with role players
- Coping mechanisms
- Curriculum changes and effective teaching
- Perceptions of management

Out-of-field phenomenon and management

- Managing the out-of-field phenomenon
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- The school organisation
- The school community
  - Learners
  - Parents
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Figure 1: A diagrammatic representation of the out-of-field phenomenon