



**FACTORS INFLUENCING THE ADOPTION OF SITUATIONAL LEADERSHIP
FOR LEARNER ENGAGEMENT BY SCHOOL MANAGEMENT TEAM MEMBERS
IN SPECIAL SCHOOLS**

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Abstract

Learner engagement is widely acknowledged as a foundation for academic achievement, inclusion, and holistic development. While situational leadership has been extensively studied in mainstream education, little is known about its application in special schools where learner engagement is often challenged by diverse disabilities, cultural dynamics, and emotional needs. This study aimed to explore the factors influencing the adoption of situational leadership by School Management Team (SMT) members in special schools, with a focus on how such practices enhance learner engagement. Guided by the interpretivist paradigm, a qualitative approach and generic design were adopted. Data were collected through semi-structured face-to-face and virtual interviews with 12 purposively selected participants, comprising principals, deputy principals, and departmental heads from three diverse special schools. Data were analysed thematically using Braun and Clarke's six-phase framework. Findings revealed that learner diversity, individual learning needs, cultural accommodation, empathy, emotional and behavioural awareness, and family contexts were central to shaping how SMT members

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adopted situational leadership. Leaders shifted flexibly between directive, supportive, coaching, and delegating styles to respond to learners' unique readiness and circumstances. The study recommends strengthening professional development on situational leadership, leveraging Individualised Education Plans as leadership tools, fostering inclusive school–family partnerships, and promoting inclusive school cultures. The study concludes that situational leadership provides SMT members with a critical framework for building responsive, inclusive, and learner-centred environments in special schools. Investing in adaptive leadership development is essential to ensuring that no learner is left behind.

Keywords: *family–school partnerships, inclusive education, learner diversity, learner engagement, school management team, situational leadership, special schools.*

Introduction

Learner engagement is widely recognised as a cornerstone of academic success, personal development, and inclusion. Research has consistently shown that engaged learners demonstrate stronger motivation, persistence, attendance, and a sense of belonging within the school community, all of which contribute positively to their academic outcomes and long-term success (Filgona et al., 2020). Engagement further fosters autonomy by encouraging learners to take ownership of their learning, which enhances confidence and resilience. Strategies such as inquiry-based learning, guided questioning, collaborative discussions, and hands-on activities have proven effective in stimulating critical thinking, problem-solving, and decision-making across diverse learning abilities (Adipat et al., 2021; Razak et al., 2022). However, in special schools, engaging learners with complex and diverse needs remains a challenge due to resource constraints such as inadequate assistive technologies, limited support staff, and insufficient financial resources. These limitations restrict inclusive practices and the adaptability required for responsive leadership (Jardinez & Naividad, 2024). Cultural dynamics further complicate engagement, as behaviours considered respectful in one context may be interpreted differently in another, highlighting the need for culturally responsive leadership (Abdalla & Moussa, 2024). Moreover, resistance to learner-centred approaches often reflects entrenched cultural beliefs, which can hinder the acceptance and implementation of inclusive practices in special education (Bremmer et al., 2025).

In addressing these challenges, SMTs play a pivotal role in shaping school culture, motivating learners, and fostering inclusive teaching practices. Through culturally responsive leadership, inclusive communication, and relationship building, SMTs can mitigate challenges and create environments that promote trust, equity, and psychological safety, factors that are crucial for

learner participation and resilience (Eden et al., 2024; Holzer & Daumiller, 2025). Situational leadership theory, developed by Hersey and Blanchard, offers a flexible and context-sensitive framework for SMT members, enabling them to adjust leadership styles to match the readiness and competence of learners, staff, and families (Mirčetić & Vukotić, 2021). Existing scholarship demonstrates that effective SMT leadership enhances collaboration, curriculum co-planning, and mutual accountability, which directly improves academic outcomes for learners with special educational needs (Bhat, 2023; Aydın & Ok, 2022). Yet, despite the acknowledged benefits of both situational leadership and learner engagement, little is known about how SMTs in special schools specifically adopt situational leadership practices to engage learners. Globally, empirical studies on this issue are scarce, and within the South African context, they are almost non-existent, with most available research focusing on crisis leadership or teacher-driven instructional leadership (Patriwi et al., 2022; Patriwi, 2024; Alsuhaymi et al., 2024; Rinquest & Simba, 2024). This gap underscores the importance of investigating how SMTs adapt situational leadership strategies to address the unique cognitive, social, and emotional needs of learners in special schools.

Despite the recognised importance of learner engagement, many special schools continue to struggle with sustaining it due to the diverse and complex needs of learners, which require leadership approaches that are both flexible and context-sensitive. While integrated models such as the wraparound service approach emphasise coordinated, individualised support (Hussain & Begum, 2024; Murphy & Risser, 2022), disruptions during the COVID-19 pandemic highlighted the vulnerability of these systems in South Africa and the urgent need for strengthened, sustainable support structures (Spencer et al., 2023). However, leadership practices in special schools often remain rigid or generic, limiting their effectiveness in responding to the realities of learners and families, where adaptability and cultural responsiveness are essential for inclusivity (Ballentine & Pilarz, 2024; Stefanidis et al., 2023; Oshame & Maureen, 2023; Alhassan, 2023). Although situational leadership has been explored in mainstream contexts, empirical studies on how SMT members in special schools adopt this model to foster learner engagement remain scarce globally and almost absent in South Africa, with existing scholarship focusing more on crisis leadership or instructional leadership rather than SMT-driven situational approaches (Patriwi et al., 2022; Patriwi, 2024; Alsuhaymi et al., 2024; Rinquest & Simba, 2024). Moreover, research often treats learner engagement and parental involvement as separate areas (Wrona & Wrona, 2021; Hyassat et al., 2024; Ybanez et al., 2024), overlooking their interdependence in special schools, where leadership must

simultaneously address both (Awodiji & Naicker, 2024; Oranga et al., 2022). Given that learners with the same diagnosis may require differentiated strategies that go beyond labels and account for individual readiness, interests, and learning profiles (Adare et al., 2023), situational leadership becomes crucial for SMTs to adapt instruction and engagement in ways that reduce cognitive overload (Bertoglio, 2024) while fostering trust and inclusivity through empathy and cultural understanding (Amisha, 2024). This gap underscores the need to identify the enabling and constraining factors that shape SMT members' adoption of situational leadership in special schools, with a particular focus on enhancing learner engagement.

While situational leadership has been widely examined in mainstream education (Khattak et al., 2023; Ramango & Naicker, 2022), little is known about its application in special needs education (SNE), particularly within the context of special schools. Most existing studies have focused on general education contexts (Awan & Nudra, 2023; Walton & Engelbrecht, 2022) and have overlooked the distinctive and complex leadership demands required to effectively engage learners with special educational needs (LSENs). Globally, empirical research on how SMTs adopt situational leadership to foster learner engagement in special schools is scarce, and within the South African context, such research is almost entirely absent. The limited available studies tend to examine leadership during crises (Patriwi et al., 2022; Patriwi, 2024) or concentrate on instructional and teacher leadership, rather than the specific ways SMT members employ situational leadership to enhance learner engagement (Alsuhaymi et al., 2024; Rinquest & Simba, 2024). Furthermore, scholarship on learner engagement in special schools often treats it separately from broader leadership frameworks, neglecting how situational leadership approaches are needed to address the unique cognitive, behavioural, social, and emotional needs of LSENs (Awodiji & Naicker, 2024; Oranga et al., 2022). This fragmented approach limits the applicability of existing situational leadership models to SNE contexts, where challenges such as resource constraints, capacity gaps, and socio-cultural barriers demand highly context-specific leadership strategies (Chirowamhangu, 2024). Although the benefits of learner engagement and the effectiveness of situational leadership in mainstream settings are well-documented (Jardinez & Natividad, 2024; Skae et al., 2020), there remains a critical gap in examining how SMTs in special schools practically adopt and adapt situational leadership to enhance learner engagement. Addressing this gap is essential for developing contextually relevant leadership practices that promote inclusivity, responsiveness, and improved educational outcomes for learners in special schools.

This study is significant as it seeks to provide deeper insights into how situational leadership practices can effectively foster learner engagement in special schools, a context that remains under-researched in South Africa and other developing countries. By focusing on the lived experiences of SMT members, the research will generate empirical evidence on the factors that influence leadership adaptability, the strategies employed, and the challenges encountered in addressing the diverse needs of learners with special educational needs (Bonini, 2024). Theoretically, the study contributes to leadership scholarship by contextualising situational leadership within inclusive and special education, thereby extending its application to an underexplored domain and offering a framework that integrates learner and parental engagement (Northouse, 2022). Practically, the findings will equip SMTs with evidence-based strategies to enhance communication, collaboration, and learner-centred leadership approaches that are responsive to contextual realities (Blanchard & Johnson, 2020). Furthermore, the study will inform policy and professional development initiatives, enabling education authorities to design adaptive leadership training programmes that are aligned with the lived realities of special schools, ultimately contributing to improved educational and social outcomes for LSENs (Leithwood et al., 2020).

Research Aim: The aim of this study is to explore the factors that influence the adoption of situational leadership by SMT members in special schools, with a particular focus on how such leadership practices enhance learner engagement.

Methodology

This study was guided by the interpretivist paradigm, which emphasises the process of making sense of participants' views on the phenomenon under investigation (Kivunja et al., 2017). Within this paradigm, the study focused on understanding the factors influencing SMT members in special schools to adopt situational leadership for learner engagement. A qualitative research approach was employed to explore these factors, as it facilitates the collection of rich, descriptive data that provide insights into participants' lived experiences (Oranga & Matere, 2023). This approach was deemed appropriate because it enables in-depth exploration of human behaviour, motivations, and intentions through observation and interpretation (Islam & Aldaihani, 2022). It allowed the researcher to make sense of the phenomenon from participants' perspectives and to interpret how SMT members in special schools adopt situational leadership to enhance learner engagement. In line with the research

approach, the study adopted a generic qualitative design. This design is used to understand how individuals interpret their experiences and the meanings they assign to them (Kahlke, 2018). It provided flexibility to capture participants' unique perspectives on leadership and learner engagement (Ellis & Hart, 2023). Generic qualitative research was particularly suited to this study because it enabled a deeper understanding of the factors influencing SMT members in special schools to adopt situational leadership practices.

Participants were purposively selected from special schools with different foci in two education districts in Mpumalanga Province, South Africa. This approach was particularly useful in identifying individuals with substantial knowledge and experience related to the phenomenon under study (Hagaman & Wutich, 2017). A total of 12 participants took part in the study: three principals, three deputy principals, and six departmental heads. To diversify the types of schools included, the sample consisted of a school focusing on learners with intellectual disabilities, a pre-vocational special school, and one catering for learners with behavioural challenges. One of these schools was independent, while the other two were public, thereby adding diversity in terms of ownership. To ensure adequate expertise, principals and deputy principals were required to have at least four years of experience in their roles, while departmental heads needed a minimum of three years of management experience. Both face-to-face and virtual semi-structured interviews were used as the primary methods of data collection. Each interview lasted approximately 45 minutes. Virtual interviews were conducted at participants' convenience, while face-to-face interviews were held in private spaces such as staff rooms and boardrooms to minimise disruptions. Semi-structured interviews enabled the researcher to ask open-ended questions and probe for clarity, thus generating detailed responses (Elhami & Khoshnevisan, 2022). Microsoft Teams was used for virtual interviews, which were recorded and transcribed using the Grain app, while face-to-face interviews were recorded and transcribed using the Notta app.

Data were analysed using thematic analysis, specifically following Braun and Clarke's (2006) six-phase framework. Both virtual and face-to-face interviews were recorded and transcribed, after which the transcripts were coded to identify significant patterns. These codes were organised into subthemes and overarching themes aligned with the study's aim. Themes were then reviewed, refined, and contextualised within existing literature to enhance interpretive depth and theoretical alignment. The study adhered to rigorous ethical standards. Ethical clearance was obtained from the University of Johannesburg's Research Ethics Committee

prior to data collection. Permission was also sought from the principals of participating schools, initially through phone calls followed by formal emails detailing the purpose of the study, participant requirements, and measures to ensure anonymity. All participants were informed that participation was voluntary, with the right to withdraw at any stage, and signed consent forms outlining their rights and responsibilities. To protect confidentiality, pseudonyms were assigned to participants and schools. Data were stored securely on a password-protected device. Throughout the process, the rights, dignity, and well-being of participants were prioritised in accordance with ethical research practices (Xu et al., 2020).

Limitations of the Study

This study had three key limitations. Firstly, data were collected solely through semi-structured interviews, limiting opportunities for methodological triangulation; the absence of observations or document analysis restricted insights into how leadership practices were enacted in real time. Secondly, the study was geographically confined to two districts in Mpumalanga Province, restricting the transferability of findings to other provinces or national contexts. Thirdly, logistical and time constraints curtailed the scope of data collection, limiting the ability to capture leadership practices as they evolved over a longer period. While the findings offer valuable contributions, they should therefore be interpreted as context-specific.

Findings and Discussion

Learner Diversity

Participants indicated that the diversity of learners in special schools, including variations in disability, emotional needs, and cognitive ability, influences how SMT members adopt situational leadership for effective learner engagement. Principal 2 explained that situational leadership enables them to differentiate support even among learners with similar diagnoses: *“Through situational leadership, I am able to differentiate learners regardless of their disabilities. For example, two learners diagnosed with cerebral palsy still require tailored engagement, despite having the same diagnosis.”* Principal 3 highlighted the flexibility of situational leadership in engaging learners at different levels of independence: *“I adopted situational leadership because it allows me to tailor my engagement with each learner according to their unique circumstances. I use coaching approaches to engage more independent learners and more hands-on approaches for those who require additional guidance.”* Deputy Principal 1 shared how they adapt extracurricular activities to align with

the abilities of individual learners: *“Through situational leadership, I am able to adapt extramural activities to suit each learner. For example, when learners must participate in a sporting code, I design activities within that sport to cater for each learner’s ability.”*

Departmental Head 3 emphasised inclusivity and the importance of encouraging participation from all learners: *“I chose situational leadership so that I could be inclusive in my engagement with learners. I always advise teachers to ensure that all learners participate in classroom activities, no matter how minimal the participation may be.”* Departmental Head 6 pointed out that situational leadership allows for emotional responsiveness in learner support: *“I adopted situational leadership because it allows me to shift my approach whenever necessary to offer the required emotional support to learners who experience challenges that warrant it.”*

The data reveals that learner diversity, encompassing variations in cognitive ability, physical disabilities, emotional needs, and levels of independence, plays a pivotal role in how SMT members in special schools adopt situational leadership to enhance learner engagement. Participants consistently emphasised that no single leadership approach fits all learners; instead, flexible, context-sensitive strategies are essential for inclusive engagement. Principal 2 illustrated this clearly by highlighting how even learners with the same diagnosis, such as cerebral palsy, require differentiated engagement strategies. This underscores the need for leaders to go beyond diagnostic labels and focus on individualised learning profiles. As supported by Adare et al. (2023), differentiation is not only about curriculum delivery but also about understanding learners’ unique readiness levels, interests, and learning profiles, core tenets that situational leadership supports through adaptability. Principal 3 further reinforced this by describing how leadership approaches vary depending on a learner’s level of independence. By employing a coaching style for more independent learners and a directive or supportive style for others, the leader exemplifies (Bwalya, 2023) the situational leadership model, which recommends adjusting leadership behaviours based on followers' competence and commitment levels. This flexibility is crucial in special school settings, where developmental variability is often more pronounced.

Departmental Head 3 added a crucial layer by stressing the importance of inclusive participation in classroom activities. Even minimal participation is seen as meaningful, reinforcing Vygotsky’s (1978) sociocultural theory that learners benefit from engagement within their zone of proximal development, supported by responsive adult guidance. This perspective highlights that situational leadership is not only instructional but also developmental, as it scaffolds learners’ involvement based on their current capacities.

Furthermore, Departmental Head 6's comment on emotional responsiveness speaks to the affective domain of leadership, wherein leaders recognise and respond to learners' emotional states. This echoes Babatunde et al.'s (2023) emotional intelligence framework, which links effective leadership with the ability to perceive, understand, and respond to emotional cues. Situational leadership, in this case, provides SMT members with the agility to shift between directive and supportive roles as emotional contexts demand.

The findings suggest that learner diversity acts as a catalyst for the adoption of situational leadership, rather than a barrier. SMT members are not only aware of the varied needs of learners but also actively use situational leadership as a mechanism to navigate complexity, promote equity, and sustain engagement. This approach reflects a deep understanding that inclusive leadership must be responsive, flexible, and learner-centred, particularly in special education environments where standardised approaches are insufficient. The SMT members' use of differentiated strategies within situational leadership supports the notion that contextual intelligence is vital for leading diverse learners effectively (Dhakal, 2024). By tailoring their leadership styles, SMT members not only accommodate learners' differences but also affirm their worth and potential, fostering a more inclusive and empowering school culture. This aligns with the broader educational objective of leaving no learner behind, as outlined in South Africa's EWP 6 (2001), making situational leadership both a practical and ethical imperative in special school contexts.

Individual learning needs

Participants emphasised that the adoption of situational leadership strategies by SMT members is largely influenced by the diverse and unique learning needs of learners in special schools. These needs require flexible and responsive leadership approaches tailored to the pace, preferences, and developmental levels of each learner. Principal 2 explained that engagement strategies are guided by learner-specific needs as outlined in Individual Education Plans (IEPs), stating, *"Through the design of Individual Education Plans, we come up with engagement approaches that are learner-friendly and maturity-appropriate. We use them to design learning activities that ensure each learner acquires some learning, regardless of the kind of learning. Our expectations, as per each learner's IEP, are learner-specific."* Principal 3 highlighted the importance of differentiated pacing to avoid overwhelming learners, saying, *"We encourage every teacher to design learning activities that respond to every learner's specific learning pace so that no learner feels rushed in their learning journey."* Deputy Principal 1 shared how

the team adjusts their engagement based on individual learner preferences, particularly with regard to sensory or instructional modes: *“We adapt our engagement to suit every learner; we engage learners who prefer visual aids accordingly, and for those who prefer more hands-on engagements, the same is done.”* Departmental Head 3 described how their leadership style shifts according to each learner’s goals and progress: *“Each one of our learners has specific goals stated in their Individual Education Plans. I shift between coaching, directing, delegating, and supporting, depending on where the learner is in terms of their learning journey.”* Departmental Head 6 emphasised the contextualised understanding of success within special schools, noting, *“In a special school context, success looks different for every learner. My role is to adapt to every learner’s level of development and aim to help them reach their own sense of success.”*

The data indicate that SMT members in special schools adopt situational leadership strategies in response to the diverse individual learning needs of their learners. This finding aligns with the foundational premise of situational leadership theory developed by Hersey and Blanchard (1982), which posits that effective leaders adapt their leadership style based on the readiness, competence, and commitment of those they lead. In the context of special schools, this adaptability becomes particularly crucial given the wide spectrum of cognitive, emotional, and physical needs that learners may present. Participants consistently referenced IEPs as a central tool in guiding differentiated leadership and teaching strategies. As Principal 2 noted, IEPs allow SMT members to promote learner-centred approaches by setting expectations that are “learner-specific”. This practice supports the view of Damyanov (2024), who argues that differentiation is not only an instructional strategy but also an ethical commitment to meet learners “where they are” developmentally, cognitively, and emotionally.

Moreover, Principal 3’s emphasis on differentiated pacing reflects an understanding of cognitive load theory (Bertoglio, 2024), which cautions against overwhelming learners by exceeding their working memory capacity. By encouraging teachers to adapt instruction to individual learning paces, SMT members demonstrate a leadership commitment to reducing anxiety and enhancing comprehension among learners with diverse needs. Deputy Principal 1’s reference to varying instructional modes, visual and hands-on, further illustrates the application of multimodal learning principles, which are particularly important in special education contexts. Learners with sensory processing disorders or neurodevelopmental differences often benefit from instruction that aligns with their preferred learning modalities

(Pucel, 2024). This responsiveness on the part of SMT members affirms the notion that leadership in special schools must include pedagogical sensitivity and flexibility.

From a leadership perspective, Departmental Head 3's use of shifting between coaching, directing, delegating, and supporting exemplifies the core operationalisation of situational leadership, matching leadership behaviour to the learner's developmental stage. This aligns with Khaleel et al. (2024), who explain that situational leadership is most effective when leaders assess the task-specific needs of followers and adjust their behaviour accordingly. This dynamic approach ensures that leadership is not static but evolves alongside learner growth. Similarly, Departmental Head 6's statement captures a contextualised, inclusive understanding of achievement that is essential in special schools. This perspective aligns with Sanger's (2020) inclusive pedagogy model, which suggests that teaching and leadership should not be focused on fitting learners into pre-existing models of success but rather on expanding definitions of success to include diverse learner outcomes.

Taken together, the data suggest that SMT members in special schools do not adopt a one-size-fits-all leadership approach. Instead, their leadership is contextual, learner-responsive, and grounded in developmental appropriateness. The integration of IEPs into leadership decisions ensures that learner engagement is not only instructional but also strategic, developmental, and empathetic. The leaders' ability to shift between various leadership styles, coaching, directing, supporting, and delegating, based on learners' individual progress illustrates the fluidity and responsiveness required of leaders in special education environments. This finding reaffirms that effective situational leadership in special schools requires a combination of emotional intelligence, pedagogical competence, and reflective practice. It also underscores the importance of ongoing professional development for SMT members to build the skills necessary for navigating learner diversity with nuance and compassion.

Accommodation of different cultures

Participants emphasised that accommodating learners' diverse cultural backgrounds is crucial in adopting situational leadership for effective learner engagement in special schools. SMT members noted that flexibility and cultural sensitivity are key to fostering trust and motivation among learners. Principal 3 explained that their leadership approach involves adapting to cultural practices unfamiliar to the SMT team: *"I have been flexible in my leadership and made space for different cultures to thrive. For instance, during the initiation school period, although none of us in the SMT fully understands the practice, being an all-white team, we still had to*

adapt to the cultural environment in which we work.” Principal 1 highlighted the role of empathy and cultural awareness in building trust with learners: *“To build trust with my learners from different cultural backgrounds, I’ve had to lead with flexibility, empathy, and cultural understanding.”* Deputy Principal 2 pointed out the need to adapt leadership approaches to suit individual learners’ cultural values: *“My leadership changes according to learners’ cultural values; what encourages one learner may discourage another. I’m duty-bound to be adaptable to such differences.”* Departmental Head 1 emphasised the value of situational leadership in showing cultural respect: *“Through situational leadership, I’m able to show respect for learners’ different cultures, which makes them more open, cooperative, and motivated.”*

The data highlight that accommodating learners’ diverse cultural backgrounds significantly influences how SMT members adopt situational leadership for effective learner engagement in special schools. Participants acknowledged that culturally responsive leadership is not optional but essential in contexts where learners come from varied cultural and linguistic backgrounds. This aligns with the understanding that cultural competence is a critical component of effective leadership in diverse educational environments (Eden et al., 2024). Principal 3’s account illustrates an example of situational leadership in response to unfamiliar cultural practices, such as learners’ participation in initiation schools. Despite lacking direct cultural knowledge and being part of an all-white SMT team, the principal demonstrates cultural humility by acknowledging this gap and making deliberate efforts to respect the cultural realities of the learner population. This reflects what Kato (2025) describes as culturally responsive school leadership, which involves recognising and valuing learners’ cultural identities, even when leaders do not share those cultural experiences.

Principal 1 emphasises the role of empathy and cultural understanding in building trust with learners from diverse backgrounds. This sentiment is supported by Amisha (2024), who argues that emotionally intelligent leadership, rooted in empathy and responsiveness, is foundational to building strong relationships and fostering learner engagement, especially in multicultural settings. Trust, as built through culturally aware leadership, becomes a channel through which motivation and cooperation are enhanced. Similarly, Deputy Principal 2 notes that what motivates learners is often deeply embedded in their cultural values, and failing to recognise this can lead to disengagement. This observation aligns with the situational leadership theory proposed by Hersey and Blanchard (1988), which emphasises that effective leadership is context-dependent and requires tailoring approaches to the individual needs and values of followers. In this context, cultural sensitivity becomes a form of situational responsiveness,

allowing SMTs to lead in ways that are both respectful and effective. Departmental Head 1 further reinforces this view by highlighting how situational leadership creates space to demonstrate respect for learners' cultural identities. The result is a more open, cooperative, and motivated group of learners. According to Naz (2023), when students feel that their cultural backgrounds are validated and respected in the classroom, their levels of engagement, participation, and achievement are significantly enhanced.

The data underscore that situational leadership in special schools must be inherently flexible, culturally responsive, and learner-centred. SMT members are required to navigate a landscape where rigid leadership models are insufficient. Instead, leadership becomes a dynamic process of learning from learners' backgrounds, adapting to them, and using this understanding to create inclusive, empowering educational environments. Moreover, this data confirms that cultural accommodation is not a peripheral issue but central to learner engagement, particularly in special school settings where intersectional challenges of disability and culture often coexist. As such, leadership development programmes should incorporate training on cultural intelligence and responsiveness, equipping SMT members to lead effectively in culturally complex learning environments (Adeniyi et al., 2024).

Empathy-driven

Empathy emerged as a central factor influencing SMT members' adoption of situational leadership for learner engagement in special schools. Participants emphasised that understanding learners' emotional and psychological states enables leaders to adapt their responses, rather than rely solely on rigid disciplinary methods. Principal 1 shared how empathetic awareness influences decision-making by stating, *"Before I make a decision about a learner, I try to feel what they might be feeling. That shift makes all the difference."* Similarly, Principal 2 emphasised the foundational role of empathy in building trust with learners: *"Empathy opens the door to trust, and without trust, no leadership strategy can succeed in a special school."* Deputy Principal 2 highlighted the importance of emotional intelligence in responding to learners' challenges: *"Leadership in special schools requires emotional intelligence; we must respond, not react, to our learners' struggles. We need to place ourselves in their respective circumstances in order to better understand them."* Deputy Principal 3 reinforced the value of compassion, noting that situational leadership makes space for understanding each learner's background: *"Every learner has a story, and situational leadership allows us to adapt our approach with compassion at its core."* Departmental Head

1 explained that empathy shapes not only instruction but also how leaders respond to learners: *“Leadership in special schools must begin with understanding. Empathy guides how I respond, not just how I instruct.”* Departmental Head 5 illustrated how empathetic leadership reframes responses to behavioural challenges: *“When we choose to understand a meltdown instead of punish it, we model the kind of leadership our learners need. Our learners need to be understood, and their plea for our listening ears emerges differently.”*

Participants consistently highlighted the need for leaders to understand and emotionally connect with learners to adapt their leadership approaches meaningfully. Unlike traditional, authoritarian leadership models that emphasise compliance and control, empathy-driven situational leadership recognises that every learner's needs, behaviours, and responses are influenced by unique emotional and psychological conditions (Subramanian & Banihashemi, 2024). Principal 1's statement reveals an intentional effort to integrate empathy into leadership decisions. This underscores Sharma's (2024) assertion that emotional intelligence, particularly empathy, is foundational to effective leadership, especially in contexts requiring flexibility and interpersonal sensitivity. For learners in special schools, whose behavioural and cognitive differences may obscure traditional cues of engagement or distress, empathy enables SMTs to respond to needs rather than merely enforce behavioural expectations.

Principal 2's remark reflects literature affirming that trust is a mediating factor between leadership and learner engagement (Sun et al., 2023). Trust cannot be engineered through policy alone; it is cultivated through consistent, compassionate leadership practices that validate learners' experiences. Empathy thus becomes not just a leadership trait but a strategic tool for establishing relational depth necessary for learner responsiveness. Deputy Principal 2 advanced this perspective by highlighting the need to “respond, not react” to learners' challenges, emphasising emotional intelligence as a leadership competency. In the context of special education, such a stance aligns with the work of Babatunde (2023), who describes emotional intelligence as the capacity to perceive, assess, and respond appropriately to emotional cues. Responding rather than reacting implies a deliberate, context-sensitive leadership approach, a hallmark of situational leadership.

Deputy Principal 3 and Departmental Head 1 both connected empathy to the broader context of learners' lived experiences. Their recognition that “every learner has a story” and that leadership must “begin with understanding” reinforces situational leadership theory's core tenet, that effective leadership is contingent upon the readiness and specific needs of the follower (Michel, 2024). In special schools, this means leaders must be attuned to not only

learners' cognitive and developmental levels but also their emotional landscapes and sociocultural backgrounds. Departmental Head 5's reflection offers a critical interpretation of empathy in action. It reflects a paradigm shift from punitive discipline to restorative, responsive leadership that humanises both the learner and the leader. This mirrors Chen and Shih's (2025) ethic of care framework, which advocates for educational relationships grounded in compassion, attentiveness, and reciprocity. In reframing behavioural outbursts as communicative acts rather than disobedience, empathetic SMT members demonstrate how leadership can serve as a tool for healing and inclusion.

These narratives show that empathy in situational leadership transcends emotional nicety; it is a deliberate, context-responsive leadership strategy crucial for learner engagement in special schools. SMTs who practise empathy are not only more attuned to learners' unique challenges but also better positioned to create psychologically safe environments that foster trust, participation, and academic growth. Empathy acts as a diagnostic lens through which SMTs interpret learner behaviours, enabling them to adjust their leadership styles, from directive to supportive, based on the emotional and developmental state of each learner. Thus, empathy-driven leadership fosters adaptive engagement, emotional connection, and mutual respect, factors that are particularly significant in the context of special schools where learners often face compounded vulnerabilities. The data supports existing literature on situational and transformational leadership while extending it by foregrounding empathy as a vital leadership disposition in inclusive educational contexts.

Emotional and Behavioural Understanding of Learners

Participants indicated that one of the factors influencing the adoption of situational leadership by SMT members in special schools is their deep awareness of learners' emotional and behavioural conditions. Principal 1 explained that interpreting learner behaviour through an emotional lens is key to effective engagement: *"When a learner lashes out, I don't see disobedience; I see an unmet emotional need that leadership must respond to."* Principal 2 emphasised the importance of avoiding one-size-fits-all disciplinary or engagement methods: *"We can't apply a blanket approach; each learner's behaviour tells a unique story that requires a unique response."* Principal 3 highlighted that situational leadership is necessary to support learners facing psychological and emotional difficulties: *"To engage our learners, we must lead in a way that accounts for their trauma, anxiety, and behavioural barriers, not in spite of them."* Deputy Principal 2 elaborated on the need for leadership that adapts continuously, even

with the same learner: *"I tailor my leadership style depending on the emotional state of learners; even the same learner may need different approaches each week."* Departmental Head 2 discussed how environmental triggers are considered before making judgements about behaviour: *"We consider triggers like noise, lighting, and peer conflict before labelling a learner's behaviour as 'disruptive'."* Departmental Head 5 shared how lesson planning includes emotional readiness, not just cognitive ability: *"In our department, we modify lesson delivery not just for cognitive ability, but for emotional readiness too."*

Situational leadership emphasises the need for leaders to adjust their leadership approach based on the readiness and developmental levels of those they lead. In the context of special schools, learner readiness is not only cognitive but also deeply emotional and behavioural. As the data shows, SMT members consistently recognise that emotional distress, trauma, anxiety, and behavioural disorders are part of the learner's lived experience and must be central considerations in leadership practice. For instance, Principal 1's insight that disobedience often reflects "unmet emotional needs" underscores Babatunde et al.'s (2023) theory of emotional intelligence, which suggests that effective leadership involves recognising, understanding, and responding to emotions in others. This capacity becomes especially crucial in special education settings, where learners may not always articulate their emotional states verbally. Leaders who are emotionally attuned are better equipped to de-escalate conflicts, build trust, and foster engagement (Riyaz & Prajapati, 2025). Principal 2 and Deputy Principal 2 both reject universal disciplinary approaches, favouring instead differentiated responses. Their perspectives echo the work of Khayreddine & Hafida (2024), who advocate for differentiated instruction and support, stressing that one-size-fits-all models are incompatible with inclusive education. By tailoring leadership strategies to individual emotional and behavioural needs, SMT members are aligning leadership practice with learner-centred pedagogical principles.

Principal 3's comment further illustrates the therapeutic dimension of leadership in special schools, where engagement requires sensitivity to psychological trauma. This aligns with literature on trauma-informed educational leadership, which emphasises safety, trustworthiness, and empowerment as foundational principles (Alhassa et al., 2025). Engaging learners "not in spite of" but because of their trauma reflects a strengths-based leadership mindset, one that acknowledges the resilience within students even as it accommodates their vulnerabilities. Environmental factors such as noise, peer conflict, and sensory sensitivities, as noted by Departmental Head 2, also shape learner behaviour. These insights are consistent with Bronfenbrenner's (1979) ecological systems theory, which posits that behaviour is shaped by

the interaction between the individual and their environment. Understanding the external triggers allows SMT members to contextualise behaviour and adjust expectations and interventions accordingly. Departmental Head 5's mention of lesson planning that considers emotional readiness reinforces the idea that instructional leadership in special schools extends beyond academic planning. Emotional readiness is a precondition for engagement and learning (Huang et al., 2023). By embedding this consideration into planning, SMTs demonstrate a form of transformational leadership, which prioritises the holistic well-being of learners and aims to inspire, motivate, and support them (Ausat et al., 2024).

The data strongly supports the notion that situational leadership in special schools is deeply interwoven with emotional literacy, environmental awareness, and learner-centred responsiveness. SMT members who actively interpret learner behaviour through emotional and contextual lenses are not merely applying discipline; they are fostering inclusive engagement. Their adaptive strategies illustrate a nuanced form of leadership that respects learner dignity, acknowledges individual stories, and tailors responses accordingly. This form of situational leadership is not reactive but proactive and empathetic, serving as a critical lever for meaningful learner engagement in specialised educational environments.

Family Context

Participants highlighted that understanding the family context of learners is crucial in shaping how SMT members adopt situational leadership to enhance learner engagement in special schools. Principal 1 emphasised the importance of involving parents as essential partners in understanding and supporting learners: *"We cannot lead effectively without understanding the home context of our learners; parents are key partners in this journey, and they are the first people to consult in order to better understand our learners."* Principal 3 echoed the value of relational leadership, particularly in the context of special schools: *"Leadership in special schools must be relational, and family relationships are central to that process."* Deputy Principal 2 explained that family involvement varies, and leadership must adjust to each family's level of engagement: *"We tailor our communication and leadership strategies depending on each family's capacity to engage. Due to work-related issues, some parents may only engage minimally, and some families are just not interested, so we have to strike a balance in that regard."* Deputy Principal 3 highlighted that situational leadership enables flexibility to meet families based on their unique circumstances: *"Each family is different, and situational leadership allows us to meet each family where it is emotionally, financially, and in other*

respects." Departmental Head 1 drew attention to the influence of emotional and cultural factors in family dynamics, which affect how leadership is applied: *"We adapt our leadership based on the emotional and cultural dynamics within each learner's family environment. I have dealt with families where at least one parent also experiences a disability, and some family members have their own theories about the causes of the disabilities, which are based on cultural beliefs."* Departmental Head 4 pointed out that leadership styles shift depending on families' confidence and available resources: *"Engaging families requires us to switch between directive and supportive leadership, depending on their confidence and resources."* Departmental Head 5 summarised the adaptive nature of situational leadership in working with parents: *"Situational leadership empowers us to vary our approach; some parents need support, others collaboration."*

The data clearly underscore the significant role of family context in shaping how SMT members adopt situational leadership approaches to facilitate learner engagement in special schools. Across the responses, there is a shared recognition that effective leadership in these contexts must be both responsive and adaptive to the diverse emotional, cultural, and socio-economic realities of learners' families. Participants expressed that understanding the home environment is essential for developing relevant support strategies. Principal 1's assertion foregrounds the notion that families are not peripheral but central to the learner support ecosystem. This aligns with Adelabu and Mncube's (2023) theory of overlapping spheres of influence, which posits that students' success is best supported when schools, families, and communities work in collaboration. The incorporation of family context into leadership decisions highlights the need for relational leadership, as Principal 3 notes, which is particularly important in special education settings, where individualised support is critical (Darling-Hammond et al., 2020).

The data also suggest that situational leadership in special schools is marked by fluidity and context-sensitive engagement, especially when working with families whose levels of participation vary. As Deputy Principal 2 and Departmental Head 4 noted, SMT members must adapt communication and leadership styles to match each family's confidence, resource base, and availability. This reinforces Hersey and Blanchard's (1988) model of situational leadership, which proposes that leaders must modify their behaviour depending on the readiness and needs of those they lead. In this case, families' readiness is influenced by their social conditions, availability, and level of understanding of their child's needs. Importantly, Deputy Principal 3 and Departmental Head 1 provide insight into intersectional influences,

such as disability within the family and cultural beliefs about disability. These factors can affect parental engagement, perceptions of schooling, and trust in institutional interventions. Cultural explanations of disability may sometimes conflict with the biomedical or educational frameworks applied by the school. This intersection requires culturally responsive leadership, which Niesche (2024) advocates as essential in diverse schooling contexts. SMT members, therefore, must apply empathy and cultural competence to navigate these complexities while maintaining professional engagement with families.

Moreover, Departmental Head 5's observation encapsulates the essence of situational leadership, adjusting one's role from expert to facilitator depending on the parent's capacity and willingness to engage. This echoes Scott and Bender's (2025) argument that situational leadership is not merely reactive but also proactive in identifying the leadership style that is most appropriate to the demands of each unique situation. For families with limited resources or understanding, a more directive approach may be necessary, while others may thrive with participative leadership where decision-making is shared. Collectively, the responses reveal that SMTs in special schools do not employ a one-size-fits-all model. Rather, they demonstrate leadership agility, grounded in an understanding of family dynamics. This adaptability is essential in special education settings where family involvement is pivotal, yet often complicated by broader socio-cultural and economic challenges (Alene et al., 2025). Therefore, situational leadership, when used effectively, allows SMT members to bridge institutional goals with familial realities, promoting inclusive learner engagement.

The data reveal that SMT members see families not just as external stakeholders but as co-constructors of learner success. Leadership becomes an act of negotiation between institutional expectations and home-based realities. By applying context-sensitive leadership, SMTs are not only responding to learner needs but are also addressing structural and relational gaps that influence learner engagement. The use of situational leadership allows for tailored responses, whether the need is emotional support, resource mobilisation, or cultural mediation. This reinforces the growing consensus that effective leadership in special schools must be collaborative, inclusive, and culturally aware (Villaver et al., 2024).

Recommendations

Based on the findings of the study, the following recommendations were made:

1. Strengthen professional development: It is recommended that the Department of Basic Education (DBE), in collaboration with teacher training institutions and district education

offices, prioritise continuous professional development programmes for SMT members in special schools. These programmes should focus on situational leadership, with practical modules on flexibility, empathy, cultural responsiveness, and trauma-informed practices. Workshops, peer-learning forums, and mentorship programmes can serve as effective platforms to build leadership capacity. By equipping SMT members with adaptive leadership skills, schools will be better positioned to engage learners with diverse needs and ensure no learner is left behind. Strengthening professional development will not only improve leadership practice but also foster inclusive learning environments that promote equity and holistic learner development.

2. Leverage IEPs and context-sensitive strategies: SMT members should be encouraged to use Individualised Education Plans and learner profiles as more than just teaching guides; they should be integrated into leadership and decision-making practices. This can be achieved through regular SMT-led review meetings, where progress is tracked, and strategies are adjusted to meet learners' developmental, cognitive, emotional, and cultural needs. The DBE and school districts can support this by providing training on data-driven decision-making and differentiated leadership approaches. Implementing this recommendation ensures that learner engagement strategies are not generic but are tailored to individual learners' profiles. The significance of this lies in aligning leadership with the unique realities of learners in special schools, thereby improving engagement, reducing exclusion, and strengthening overall school performance.

3. Foster inclusive school–family partnerships: SMT members should adopt situational leadership strategies when working with families by recognising the varying resources, capacities, and cultural beliefs that shape parental involvement. This can be operationalised through parent workshops, home–school visits, and flexible consultation structures that allow parents to engage at their own pace and comfort. Education officials, together with SMTs, should also provide culturally responsive training for staff to ensure that family engagement is respectful and inclusive. Implementing this recommendation is significant because families are central to the learner support ecosystem; their involvement can reinforce engagement strategies beyond the classroom. Strengthening these partnerships will build trust, reduce barriers to participation, and ensure learners receive consistent support both at school and at home.

4. Promote inclusive school cultures: SMT members, in partnership with teachers and district officials, should institutionalise practices that build inclusive and learner-centred school cultures. This can be done by embedding restorative discipline approaches, validating cultural

identities, celebrating diverse learner achievements, and ensuring learners actively participate in decision-making processes. Leadership training programmes should also emphasise cultural intelligence and inclusive pedagogy as part of daily school management. The significance of this recommendation is that it transforms special schools into spaces of belonging, where learners' dignity, strengths, and potential are recognised. An inclusive school culture enhances motivation, strengthens cohesion, and contributes to long-term learner success while positioning situational leadership as a practical tool for promoting equity and inclusivity.

Conclusion

This study explored the factors that influence the adoption of situational leadership by SMT members in special schools, with a focus on enhancing learner engagement. The findings revealed that learner diversity, individual learning needs, cultural accommodation, empathy, emotional and behavioural awareness, and family contexts significantly shape how situational leadership is enacted. SMT members demonstrated flexibility by shifting between directive, supportive, coaching, and delegating styles, guided by the readiness and unique circumstances of learners and their families. The evidence underscores that situational leadership is not a peripheral leadership model in special schools but a critical framework for ensuring inclusivity, equity, and effective learner engagement. By recognising learners' differences as catalysts rather than barriers, SMT members model adaptive, responsive, and learner-centred leadership. This approach affirms the worth of every learner, strengthens school–family partnerships, and fosters inclusive school cultures that prioritise both academic and emotional development. Going forward, there is a pressing need for policymakers, training institutions, and school leaders to embed situational leadership principles into professional development, school policies, and daily practices. Special schools must become spaces where leadership adapts to learner diversity, responds with empathy, and partners with families to ensure no learner is left behind. The call to action is clear: invest in building situationally adaptive leaders who can transform the complexity of special education into opportunities for engagement, empowerment, and long-term learner success.

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