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# **ORGANIZATIONAL STUDIES IN AN ERA OF EDUCATIONAL REFORM**

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## **Abstract**

One social science base for educational administration proposed in the Baron and Taylor collection was organization theory. In the event this expectation turned out to be over-optimistic. Organization theory was much too contested and insufficiently pragmatic for the British taste. Major developments in this field occurred mainly in the United States.

Nevertheless, the more general approach of organizational studies continues to enhance our understanding of schools where a 'both-and' perspective is adopted towards organizational dualities, particularly in the face of what we have provocatively termed 'transformania'. The paper explores the unintended consequences of relentless transformania through three examples of duality: organization-institution, bureaucracy-professionality and the culture of teaching-the culture of managerialism. Finally, it is suggested that a revival of an interest in the somewhat dormant theory of ambiguity would be timely.

## Introduction

The purpose of the compilation edited by Baron and Taylor (1969) was to review the emerging field of educational administration and to stimulate the development of a social science base. Three contributors—Eggleston, Burnham and Hoyle—explored the potential for sociology in establishing such a foundation. Hoyle concentrated on organization theory, and reviewed the current state of play as well as suggesting possible areas for future development: goals, boundaries, lower participants, and professionalism. The tone of the chapter was one of guarded optimism, which later emerged to have been misplaced—in Britain at least. This was largely because organizational *theory* was at odds with English pragmatism. In their introduction Baron and Taylor (1969:vii) had written of their collection: ‘The dominant mode is that of English pragmatism: this is as it should be in a book emanating from a country in which the *practice* of administration has long been held in high esteem and in which the theory is only now receiving attention’.

The language of organizational and administrative theory, as it developed in the United States, was alien to British usage. ‘Plain English’ was preferred. Thus schools were not ‘organizations’, they were, simply: ‘schools’. They were not ‘administered’—administration had different connotations in Britain. Still less were they ‘managed’. Schools were ‘run’. They were run by headteachers who were regarded as just that: head teachers. The term leadership was little used. In Weberian terms, heads were not ‘bureaucratic leaders’. Some may have been ‘charismatic’ leaders, but essentially they were ‘traditional leaders’: their position was ‘ascribed’ on the basis of diffuse personal qualities, rather than ‘achieved’ on the basis of having met specific and generally -recognized criteria.

The policy issue dominating educational discourse at the time of the post-war welfare state was that of *equality*, particularly equality of opportunity. This discourse was embedded in sociological theories concerning class differences (ethnic and gender differences became

salient later) maintained through the processes of stratification and differentiation. Studies of life chances were very much in the British tradition of ‘political arithmetic’ typified in the work of Floud et al (1956) and put into socio-historical context by, for example, Banks (1965). This concern with social class and educational opportunity informed a number of public enquiries of the time, named after their chairs: Newsom, Crowther, Plowden, Robbins. These policy studies were accompanied by research into the processes of social differentiation *within* schools (e.g. Hargreaves, 1967; Lacey, 1970). Although these investigations focused on single schools, they were not ‘organizational studies’ as such but were ethnographic studies of the differentiation process at work.

Thus, notwithstanding the development of administrative theory and the sociology of educational organizations in the United States, the British approach remained steadfastly pragmatic and directly addressed the substantive problems facing education. Such theory as was deployed would now be termed ‘policy theory’. The attempts that were made to draw on organization and administrative theory were widely criticized. One trenchant critic wrote: ‘It is both interesting and sad that the attempt by Baron and Taylor to develop a British social science foundation to the subject [educational administration] came to nothing’ (Tipton, 1985). Tipton’s strictures were that British theorists drew too extensively on American literature, and that American theories of organization and administration theory were overly-dominated by systems approaches.

Was Tipton right? What has happened since to organization studies and the social world it inflects? And what practical use might organization studies have now for educational practice? The remainder of the paper adopts a broadly chronological approach to addressing these questions. First, we consider what Tipton may have missed: there was more to American organizational and administrative theory than the structural order-dominated

systems theory of the 1960s. Many theorists then acknowledged how contrasting characteristics of organizations might be construed as mutually implicated aspects of the same phenomenon, rather than mutually distinctive phenomena. Second, we note how interactionism challenged the hitherto dominant theoretical concern with structure by highlighted the centrality of agency, generating new theoretical interest in its integral relationship with structure. Third, we point to teachers' increasing exploitation of their agency in educational experimentation, whose consequences soon triggered a political and public backlash. Fourth, we note how the subsequent educational reform era was designed to reverse the direction of influence over education, now firmly steered by government. Fifth, we portray how the reform milieu spawned critical and practical movements in educational studies. Sixth, we make the case that, by embracing dualities, conceptually more sophisticated organizational studies can continue to illuminate the workings of educational organizations within the contemporary reform context. Seventh, we put forward a critical characterization of politically-driven educational 'transformania', and propose that a long-established, duality-sensitive conception of organizations—ambiguity theory—could both deepen understanding of today's educational organizations and inform practical coping efforts within them. Finally, we conclude by pinning our hopes for the future of education on leaders and those who support their development holding hard to their core *educational* purpose and values in finding ways to cope with tranformania.

### **Organization Theory as Duality**

The discussion of organization studies throughout this paper is framed by the concept of *duality*. Farjoun (2010:202) writes that the:

...dual search for stability and change pervades all forms of organizing and constitutes a central paradox of administration...The tension permeates social and economic life...It

also encapsulates questions of order and freedom, evolution and revolution, and routine and novelty which are fundamental to all sciences dealing with institutions and adaptive systems.

These dualities are expressed in different terms in accordance with the focus of their user. A fundamental sociological distinction (Dahrendorf, 1959) is between theories which focus either on order (stability, integration, functional co-ordination, and consensus) or on *conflict* (change, dissent, disintegration, and coercion). Other familiar binaries are: *structure-agency*, *control-autonomy*, *mechanistic-organismic*, *nomothetic-ideographic* and *bureaucracy-human relations*. As a conceptual device, binaries posit an integral link between two contrasting entities. But the nature of this linkage depends on whether the two contrasting entities are construed as a:

- *Dualism*, and so mutually distinctive, even oppositional. (What we term ‘either-or’ binaries, viewing foregrounded social phenomenon as comprising *either* one entity *or* the other—as in *either* order *or* conflict);
- *Duality*, and so mutually interpenetrative, possibly in varying proportions. (What we term ‘both-and’ binaries, viewing this phenomenon as comprising *both* one entity *and* the other—as in *both* a degree of stability relative to a degree of change, *and* a degree of change relative to a degree of stability.

Giddens’ (1984) theory of structuration was concerned with accounting for *dual* ‘both-and’ binaries characterized by interpenetrative entities. He thus referred to agency-structure as a duality, rather than the then-orthodox dualism or agency and structure as mutually distinct. Farjoun (2010) has similarly argued that binaries are usually treated as essentially conflicted whereas they frequently interpenetrate, as where stability can foster change and, conversely, change can engender stability. We follow this usage.

Our basic argument is that prior to the education reform movement which began in the 1980s, the organizational study of schools focused on how they achieved a shifting balance between *dual* ‘both-and’ binaries. But policy during the reform years has been a one-way pendulum, swinging in the direction of radical change superseding balance. The political arithmetic here is *dualistic*: taking into account only one side of what we contend, with Farjoun, to be a *dual* binary. Political conceptions have practical consequences. Dualistic policymaking has consistently downplayed the interpenetrative implications of multiple reform (change) for the maintenance of ongoing provision (stability). A consequence of ignoring the other side of the binary may have been, ironically, to undermine the capacity of reformed organizations to deliver the radical improvement sought. Hence the oxymoronic phenomenon of constant reform over multiple generations.

Organization theory, as developed within American sociology, has been much criticized for being too firmly rooted in the *order* paradigm, particularly as expressed in Parsons’ systems theory and Weber’s theory of bureaucracy (see Burrell and Morgan, 1979, for an analysis of competing organization theory paradigms). In fact, mainstream literature on schools as organizations has largely focused on duality.

We will focus on Weber’s concept of *bureaucracy* since it has so deeply influenced organization theory. In the course of his study of modernization, Weber came to the view that bureaucracy had emerged as the dominant rational approach to managing organizations. He identified bureaucracy as having several dimensions, including hierarchy, specialization, centralization, procedural rules, impersonality, and authority of office. Collectively these dimensions constitute an ‘ideal type’: an abstract model against which the actuality of organizations can be compared. A traditional approach was to construct a scale of bureaucracy, apply it to organizations, including schools, and to correlate the results with other dimensions such as size, socio-economic context (Anderson, 1965).

However, the great value of Weber's ideal type was its heuristic intent. It soon became clear that bureaucracy was but one side of duality, to be found in combination with other components of organization. This was captured in a seminal paper by Bidwell (1965) which identified 'structural looseness' as an endemic characteristic of the school. Other influential publications which explored the dual nature of educational organizations were those of Litwak (1961), Litwak and Meyer (1974), and Hanson (1979a).

The sociology of educational organizations and the study of administrative theory and education remained largely separate. The 'new movement' in educational administration in the United States developed in response to the prevailing highly normative literature, relatively untouched by theory and research, that had developed largely within the framework of 'scientific management' (see Callahan (1962) for a trenchant critique). The 'new movement' was also characterized by the duality of interpenetrating structure and human relationships, which led to works of enduring significance such as the 'nomothetic-idiographic' duality of Getzels and Guba (1957) and the 'initiating structure-consideration' duality of Halpin (1966). The concept of duality yielded a number of theoretical approaches of which three are considered here.

*Loosely-coupled systems:* This term appears to have been initially coined by James March in a Stanford seminar, but is now most closely associated with Weick (1976). It is perhaps the *ur*-metaphor of the duality perspective on educational organization. Weick writes: 'By loose-coupling the author intends to convey the image that coupled events are responsive *but* that each event preserves its own identity and some evidence of its physical or logical separateness'. Among the advantages of loose-coupling noted by Weick are: the flexibility to respond to changes in the environment—particularly in novel ways, the capacity to 'seal off' problems in one part of the organization, the potential for a relatively high degree of autonomy for actors, and the relatively low costs of co-ordination. Amongst the

disadvantages of loose-coupling identified by Weick are the persistence of archaic traditions; loss of the benefits of standardization; loss of the potential emergence of novel solutions because they remain isolated, autonomous responses; and a lack of the power of collective responses. The attractions of loose-coupling for the lower participants of an organization are more obvious than its attractions for organizational leaders, and much leadership research and training has focused on the advantageous aspects of loose coupling for the organization. Loose-coupling is a powerful metaphor at the general level. But it has generated little research, while being implicit in many theoretical perspectives.

*Contingency theory.* As with loose-coupling theory, which it partially overlaps, this dual form of theory generated some interest in education (e.g. Hanson, 1979b), but has an established place in industrial studies. Burrell and Morgan (1979:164) summarize contingency theory thus: ‘the effective operation of an enterprise is dependent upon there being an appropriate match between the nature of the demands placed upon it by its tasks, its environment and the needs of its members’. Another powerful metaphor, but again the devil is in its operationalization. The school’s responsiveness to its environment has always contained an implicit element of contingency. In the 1960s Burns and Stalker’s (1961) duality—the varying balance between *mechanistic or organismic* management strategies depending on the mix of environmental stability and change—was an important theoretical source for the training of educational administrators. However, in the early application of organization theory to schools, contingency theory had little significance. Schools were seen as ‘domesticated’ organizations which were routinely supplied with resources, rather than ‘wild’ organizations which had to forage and compete in their environment (Carlson, 1964). But in the era of reform when ‘failing’ schools may be closed down, survival has become a fundamental goal and the contingent link with the environment crucial.

*Ambiguity theory.* The relationship between stability and change constitutes the central paradox of organizational studies. ‘Either-or’ dualism represents this paradox as an essential conflict between two competing principles. ‘Both-and’ duality seeks to temper this conflict by pointing out the interpenetration between stability and change. The function of management is to handle this interpenetration in a manner which achieves a balance between the two principles. But, as March (1999:55) has noted: ‘Balance is a nice word but a cruel concept.’ Ambiguity theory challenges the linear rationality which underlies most theories of managerial decision-making. He writes (1999:178) that the notion of ambiguity embraces opacity or inconsistency in experienced reality, causation, or intention:

Ambiguous situations are situations that cannot be coded precisely into mutually exhaustive and exclusive categories. Ambiguous purposes or intentions cannot be specified clearly. Ambiguous identities are identities whose rules or occasions for application are imprecise or contradictory. Ambiguous outcomes are outcomes whose characteristics or implications are fuzzy.

Through the use of telling metaphors that are now well-known, March and his colleagues have shown the limited nature of linearity when the actual process of decision-making is observed. A cluster of related metaphors includes the *garbage can* model of decision-making: problems, solutions, the contribution of participants, and choice opportunities are intermingled rather than sequential. Hence the associated metaphor of organizations *running backwards* (where solutions precede problems). In such circumstances, the provocative oxymoronic metaphor of *organized anarchy* conveys the observation that organization is as much emergent from negotiated activities in the workplace as consequent on imposed managerial practices. March and Olsen (1976) believed that educational organizations are particularly ambiguous because of the diversity of their goals, the poorly-understood nature

of their technology—in the widest sense including all forms of the teaching-learning nexus, and the loosely-coupled nature of their organizational structure.

These insights gained little purchase in the British literature (but see Bush, 2003). Yet they were discussed on university courses and included in Open University texts on school organization and management. Participants frequently experienced the ‘shock of recognition’ when introduced to ambiguity, but even prior to the reform movement it remained at the level of ‘theory-for-understanding’ since its management implications were far from clear. Today such ideas are even less likely to be encouraged in research and training since they are anathema to the reform agenda: arguably, a fundamental objective of the reform movement is to eliminate as far as possible ambiguity in school organization and management. This is a point to which we later return.

### **Duality and Interactionism**

A major challenge to mainstream organization theory came from approaches rejecting what could be termed the *entitiness* and *lifelessness* of organizations, whereby ontological priority is given to structures over people. The term ‘interactionism’ has been chosen as a relatively uncontested term for summarising a wide range of approaches to understanding organizations which, as the phrase has it, “bring people back in”.

We begin with Waller’s (1932) master-work ‘The Sociology of Teaching’ which, after eighty years, still resonates as an insightful account of life in schools (see Willower and Boyd, 1989; Bates, 2006). Waller’s pioneering work addressed conflict, particularly between students and staff. The study is rich in metaphors, such as the school seen as ‘a museum of virtue’ and the notion of the classroom control of the good teacher being like an elastic band tightening and relaxing according to the contingent situation. From the Chicago school of sociology, Waller was influenced by the symbolic interactionist approach of G.H. Mead who

argued that a person's actions are guided by their interpretation of the actions, speech and other symbols of others, and of how others are expected to act: 'the definition of the situation'. Interactionist approaches based on the assumption that organizations are social constructs find support in the social phenomenology of Greenfield (1975, 1978). His core (1978) is that:

Organizations are not things. They have no ontological reality, and there is no use in studying them as though they did. They are an invented social reality of human creation.

It is people who are responsible for organizations and people who change them.

There is no doubt that this agentistic approach has added to our *understanding* of organizations but it is limited to one side of the structure-agency duality. Greenfield appears to have given little consideration to Berger and Luckmann's (1967:106) articulation of the structure-agency duality. They distinguish between *institutionalization*—the process by which social constructs persist over sufficient time to become a legitimate focus of social science theory and research—and *reification*: 'the apprehension of the products of human activity *as if* they were something other than human products – such as facts of human nature'. Weick has made a significant contribution to our understanding *of* how organizations are constructed, initially through his insistence on the use of the verb *organizing* to emphasize that organizations are processes before they are structures (Weick, 1979), later through using the term *sensemaking* to emphasize the socially-constructed nature of organizations (Weick, 2001).

The methodological approach best suited to this perspective is interpretative, employing qualitative case studies which treat organizations as social constructs. Thus the appropriate focus of study is not the organization as such but the perceptions of members and others *of* the organization. Where perceptions differ between groups they may come into conflict, so the approach allows for the *uncovering* of conflict rather than making a prior assumption of

its existence. This preserves the duality model which allows for the structuring through institutionalization of conflict as perceived by agents. Ethnographic studies tend to capture life in schools more effectively than traditional organizational studies but are, of course, open to the charge of non-generalizability. Glaser and Strauss (1967) proposed a method of building middle-range theories from case studies through ‘constant comparison’, but the demands of repeated comparisons may have precluded its systematic pursuit. However, case studies need not be confined to a single source of data or a single source of theory. They have been particularly attractive to researchers of UK schools. Thus Woods (1979) indicates how he supplemented his symbolic interactionist approach by drawing on Weber, Marx and some aspects of functionalist theory in framing his English secondary school case-study of conflicts between pupils, teachers and parents.

### **Shifts in Duality 1965-1975: A Prelude to Reform**

The decade or so from 1965 saw a shift in the prevailing structure-agency duality in the direction of what we can term ‘openness’ in schooling, part of a much wider international movement to ease traditional constraints on individual choice. Constructionist theories were invoked in support of such changes, not so much from the perspective of organization studies as from that of curriculum studies, a field in which social phenomenology became influential (Young, 1971).

Trends towards ‘openness’ included interdisciplinary studies, discovery learning, flexible timetabling, continuous assessment procedures, increased pupil choice over curriculum modules and study methods, mixed ability grouping, interdependent teacher roles (e.g. team teaching), open plan architecture, and closer school-community links. Two reciprocal underlying concepts were *boundary* and *negotiation*. With the erosion of existing boundaries came the need to construct and to re-construct new boundaries (Hoyle, 1974, 1975). These

trends can be regarded as separate innovations or as an interrelated and fundamental shift in schooling. Bernstein (1975), drawing on Durkheim and French structuralism, explored cultural 'codes' as the basis of social control and the largely-invisible means of means of social reproduction. He sought to demonstrate a link between codes and structures through his concepts of *classification* and *framing*. Tyler's challenging study (1983) sought to map Bernstein's codes onto a Weber-inspired Aston multidimensional scale for measuring organizational structures (King, 1983).

Similar trends were occurring in the United States with a confluence between educational progressivism and political radicalism. The aspiration of the latter was 'the long march through the institutions', mainly a phenomenon of higher education but also influential on schooling. Its inspiration came from the de-schooling movement (Illich, 1971) and associated ideas such as 'free schools', 'alternative schools', 'open schools', 'schools without walls'. Alongside developments occurring outside the public school system were state school initiatives to incorporate 'open' approaches to organization, curriculum and pedagogy. These changes generated unprecedented difficulties for school administrators.

In Britain, from the period of Baron and Taylor's publication to the emergence of the educational innovations of the late 1960s and early 1970s, there had been growing support for school leaders provided by a variety of agencies, with central government intervention only through the support of Her Majesty's Inspectorate. The emerging focus on the problem of managing change (Hoyle, 1970) proceeded in the typically pragmatic British way, covered the general term of *school-focused development* (Bolam, 1982). It entailed the integration of management development, organizational development, curriculum development, and teachers' professional development in the management of change. The approach took the school as the prime unit of change, with the support of a variety of external agencies,

including teachers' centres, professional development centres, curriculum development units, universities providing research and development skills, consultants, and change-agents.

School-focused development became a widespread movement, supported by the Organization for Economic Co-operation and Development, which convened a key workshop held in 1972 (see CERI/OECD, 1973). A generally successful movement during the period of increased 'openness', it remains, in a modified form, influential on current approaches to management. But it was somewhat overwhelmed by social, political and educational changes from the 1970s onwards.

In an article entitled 'Open schools, open society?'—the interrogative is important—Bernstein (1967) presciently suggested that 'open schools' could only succeed if supported by an 'open society'. It did not happen. Politicians became increasingly concerned that the direction in which education was moving was inimical to international competitiveness. Parents were confused about innovations in curriculum (e.g. 'the new mathematics') and pedagogy (e.g. the increase in 'project' work). Demands of innovation were leading to 'innovation fatigue' amongst teachers (e.g. Bernbaum, 1973). US ethnographic studies illuminated the difficulties faced by experiments in 'openness' (e.g. Gross et al, 1971; Smith and Keith, 1971; Swidler, 1979). Eventually these experiments ran into the sand during by the 1980s.

In Britain, a convergence between the liberalizing changes in the curriculum and New Left radicalism at William Tyndale primary school in Islington, London, created a 'perfect storm' (Auld, 1976) symbolic of the public reaction to educational change which ushered in the world-wide movement of educational reform.

## **Reform and the Changing Terrain of Organizational Studies**

The period of reform is usually dated from James Callaghan's 1976 'Ruskin Speech'. Pursued during the remainder of his Labour administration, reform was reinvigorated during the subsequent Conservative administration, resulting in the Educational Reform Act of 1988. In terms of the dualities the basis of the shift was away from loose-coupling, local experimentation and openness towards centralization, closed boundaries and tighter coupling. Beyond constituting a reaction to the perceived problems of 'the Sixties', the UK government asserted its control over the 'process' of education for the first time. Previous government policies had been mainly concerned with the overall structure of the educational system and issues of finance. Now there was political intervention into 'the secret garden of the curriculum'. The reforms spanned a national curriculum, a more critical system of inspection through Ofsted, greater competition between schools for pupil numbers, a reduction of the powers of local education authorities (LEAs), the creation of different types of schools independent of LEAs and directly related to the state, endowment of 'the right to manage' on headteachers (though matched by increased governors' powers), and a reduction of the influence of the organized teaching profession. Such reforms dramatically changed the terrain of organizational studies.

*The growing significance of policy studies.* The relationship between schools and the state assumed greater importance, as where the government imposed on schools the task of implementing centrally-determined policies. In the familiar metaphor of 'steering and rowing', Osborne and Gaebler (1993) attributed the 'steering' function to government and 'rowing' to schools—particularly their leadership. Increased state responsibility brought more regulation, devolved to a variety of intermediate agencies. This arrangement allowed the state to sustain its authority but at a distance: a process of 'hollowing out the state' (Rhodes, 1997). These developments saw the emergence of policy studies as an area of enquiry from a

combination of political studies, sociology – especially organizational studies, and what had previously been termed ‘social administration’.

The *emergence of post-bureaucratic studies*. Post-bureaucratic forms increased in response to social, political and economic change (Heckscher and Donnellon, 1994). Laffin (1998) suggested that such changes could be summed up under three headings: *organization forms*, where ‘the welfare state is becoming organizationally more diverse and pluralistic’; *control and coordination relationships* that are becoming more complex and ‘bear less and less relationship to the relative simplicities of hierarchical employment relationships’; and *organizational boundaries*, maintaining central control while adopting some decentralizing strategies.

Characteristics of post-bureaucratic organizations include flattened hierarchies, temporary teams, increased numbers of part-time workers on temporary contracts, flexible careers often entailing shifts between public and private sectors, and reconfigured inter-organizational relationships where ‘horizontal networks replace hierarchies’ (Koppenjan and Klijn, 2004:3). These developments are, to some extent, replacing the boundaries of traditional organization theory. Amongst alternative perspectives emerging in recent years are post-modern organization theory –which appears to have gained little ground, presumably owing to the fundamental ontological and epistemological problems which beset post-modernism as a meta-theory, and a focus on systemic complexity (see Wallace and Pocklington, 2002, Wallace et al. 2007). Indicative impacts of post-bureaucratic changes on schools are the increasing diversity of governance and finance arrangements for secondary schools; the growing prominence of measures for attracting clients and resources in a competitive market; diverse forms of inter-school networks or more formal federations; the appointment of ‘super-heads’ charged with ‘turning round’ schools identified as ‘failing’, the creation of temporary mini-systems as sub-committees or ‘task-and-finish’ groups; the growing diversity

of staff roles other than teaching; and an increasing use of part-time and short-term contract staff.

*Schools as management systems.* The study of schools as organizations has been largely replaced by studies of school management systems. A broad distinction can be made between the two main approaches—*school effectiveness* and *school improvement*—considered together for convenience. However, as Ouston (1999) has pointed out, there is no necessary link between effectiveness research and the theory and practice of school improvement: the former drawing on quantifiable outcomes, the latter on more diffuse factors such as culture and leadership. Nevertheless, these two adjacent fields of management studies have achieved dominance over organizational studies: management theory-for-change is likely to attract more political support, and so funding, than organization theory-for-understanding.

School improvement studies can be seen as a continuation of the school-focused approach to change emerging in the 1970s, though under the impact of reform pressures it has been re-orientated towards effectiveness. With key elements of the school improvement approach being adopted by reformers it has undergone a ‘metaphoric re-description’ (Thrupp, 2005). Strong components of the improvement literature are ‘culture’ (considered below) and ‘leadership’. Two core findings had emerged from leadership studies before the 1980s. First, the *transactional* nature of effective leadership: optimizing the balance between task and person in the relationship between leaders and led. Second, the dependence of effective leadership on context: the contingency theory of leadership. However, in the era of reform, transactional approaches were regarded as too adaptive and the emphasis shifted to *transformational* leadership, a proactive, visionary leadership for change. The earlier view of schools operating in contingent social and economic circumstances was over-ridden by the requirement that headteachers should implement central policy. The irony here was that heads could not be ‘transformative’ in any meaningful sense: the transformation of the

educational system was a task for central government, for which school leaders were conduits. Among those theorists with an ‘improvement’ orientation were those who sought to ‘gentle’ the directive role of the headteachers by advancing the claims of *distributed* or *dispersed* leadership (e.g. Bolden, 2011).

### **The Continuing Relevance of Traditional Organizational Studies**

The era of reform has challenged the relevance of traditional organization theory. However, we argue here for its continuing relevance, and have selected three dualities which make the case.

*Both organizations and institutions.* The terms *organization* and *institution* are often used interchangeably. The concept of ‘organization’ is reasonably well-understood; the concept of ‘institution’ less so. March (1999:55) notes: ‘The word ‘institutional’ has come to mean different things to different authors.’ Institutions are here considered to be those outcomes of social constructivism which have become sedimented over time: codes, rights, duties, rules, techniques and practices which provide ongoing order and stability. *Institutional theory* was initiated by Selznick (1957, 1996). He distinguished between an *organization* as ‘a rational instrument to do a job’ and an *institution*, more nearly ‘a natural product of social needs and pressures—a responsive and adaptive organism’. There is now a substantial literature on organizations as institutions (Powell and DiMaggio, 1991; Muzio et al, 2013).

The institutional aspect enables schools to inspire confidence in their stakeholders. This approach is associated with the work of Meyer and Rowan (1988). They argued that in the United States bureaucratic control over education was more apparent than real, since the structural looseness of schools allowed a considerable degree of autonomy in relation to their ‘technical core’: teaching and learning. Schools are conceived as avoiding close bureaucratic control by fulfilling ‘ritual classifications’ of school type, patterns of grouping, qualifications

of teachers, elements of curriculum, or modes of assessment. Such categories are accepted at face value by stakeholders. As Meyer and Rowan put it: ‘these categories are understood everywhere to *index* education. They are not understood to *be* education...’ The self-presentation of schools to stakeholders in the manner of Goffman’s (1969) ‘facework’ is accepted in good faith and sustains what Meyer and Rowan termed the *logic of confidence*. They suggest that the institutional perspective allows a view according to which ‘the participants are sensible people running a highly successful enterprise’ and are broadly left to get on with their core purpose of teaching and learning.

The reform movement in Britain has been partly driven by a lack of confidence in teachers, marked by a determination to expose ritual classifications as strategies by which schools avoid external regulation of the technical core. However, this is less easily achieved than politicians suppose. The ironic outcome of these policies has been to shift the ‘ritual classifications’ to another level in order to create a ‘logic of confidence’ in government policies. Among such classifications are ‘failing schools’, ‘coasting schools’, ‘special measures’, school league-tables, and inspection reports. The central government assumption is apparently that the public understands these classifications to *be* education. Yet there is abundant evidence to show that these categories are constructs which *index* education. When confronted with these reifications, there is evidence that teachers adopt strategies which Hoyle and Wallace (2005) have termed ‘principled infidelity’. Teachers conform to centrally-determined classifications, as they must, whilst working within the interstices of these prescriptions, to meet the varied educational needs of pupils. In doing so they are conforming to a more fundamental view of the school as a social institution—a ‘responsive and adaptive organism’ in Selznick’s terms.

It is demonstrable that schools are *more than* the limited classifications by which they are politically judged. Parents are concerned with test scores and exam results since these are

crucial determinants of the life chances of their children. But they also have more fundamental expectations of the school as a social institution, associated with ‘heritage, continuity, consolidation and tradition’ (Hargreaves, 1994). The rituals constituting the basis of the school as an institution are embedded in classroom practice, teacher-pupil relationships, peer-group interaction, reinforced by harvest festivals, school plays, sports days and school visits. Various writers have noted the ‘deep structure’ or ‘grammar’ of schooling (e.g. Mulford, 1998; Pentland and Rueter, 1994; Tyack and Cuban, 1995). It is this deep structure of schooling which institutional theory addresses. These codes are the parts of a school that accountability procedures cannot reach. March (1999) draws an insightful distinction between the ‘logic of consequence’ and the ‘logic of appropriateness’. The former is orientated towards outcomes, obligations, standard operating procedures. In the case of the latter, ‘Actions are expressions of what is exemplary, natural, or acceptable behaviour according to the (internalized) purposes, codes of rights and duties, practices, methods, and techniques of the constituent group and of the self’ (March 1999:57). In sum, management theory is dominated by the logic of consequences; institution theory shows a greater sensitivity towards the logic of appropriateness.

*Both culture of teaching and culture of management.* This duality embraces the interaction between two co-existing cultures in schools (Hoyle and Wallace, 2003). The ‘hyper-referential’ nature of the concept of culture (Kuper, 1999) does pose a problem in addressing this important phenomenon. The enduring complexity of the task was heralded in an early review by Ouchi and Wilkins (1985), and the ensuing ‘paradigm’ wars (Martin and Frost, 1996) between different conceptions of culture suggests that any view will be partial. Given that a school will be the site of a wide range of interacting cultures, many reflecting the cultures of the wider society, it is hazardous to speak of *the* culture of a school. We therefore

suggest a simplified distinction between two elements of a school culture: the culture of management and the culture of teaching.

Managerial culture has become central to management theory since the ‘cultural turn’ of the early 1980s (Peters and Waterman; 1982; Schein, 1985), becoming the focus of much educational management literature (Deal, 1988; Sergiovanni and Corbally, 1984; Caldwell and Spinks, 1992). Using Parsons’ (1951) distinction between *instrumental* and *expressive* goals, management culture can be seen as instrumental. It is concerned more with means than with ends, and even where concerned with ends, these too tend to be instrumental and amenable to accountability. As cultures are essentially symbol systems, they can be apprehended by observing the activities which are most highly rewarded in terms of status, prestige, remuneration, and other symbolic ‘goods’. Language is the ultimate symbolic system and ‘the metaphors of management’ (Hoyle and Wallace, 2007) illustrate the development of ‘managementspeak’ which is widely derided, but which is nevertheless, essential to the conduct of professional life and to promotion.

The culture of teaching is less easy to identify, since the ‘goals’ of education are diffuse and diverse, notwithstanding the attempts of the reform movement to reduce them to specific, proximate ends. Their expressive nature makes them difficult to defend against the charge that they offer ‘romanticism’ against ‘realism’. They are expressed in terms which are often dismissed by politicians, using the dated term ‘trendy’—including ‘progressive’. ‘discovery’, ‘child-centred’, ‘the whole child’, and ‘education for its own sake’ (famously dismissed by a Secretary of State for Education in the Blair administration as ‘a bit dodgy’).

The culture of teaching is not a unified culture. Teachers bring with them to their task elements of other cultures which shape their lives and may be conflicted: political, gender, ethnic, social class. There is, however, ethnological evidence for the existence of shared

codes which are basic to the culture of teaching ( and Louis,1999). Nias et al (1989) capture some of this in their account of a ‘culture of collaboration’ in a primary school:

One of the central components of the culture of teaching is the issue of *control*. This is a daily issue for teachers but appears to be discounted by politicians: problems of control are, as in many areas of school life, transmuted into classifications, formal procedures, targets etc.

Many years before, Waller (1932) had noted the central problem of control, depicting the school as ‘a despotism in a perilous state of equilibrium. It is a despotism threatened from within and exposed to regulation and interference from without’.

The problems faced by teachers in exercising sufficient control to teach effectively have been given sustained attention both in such early American studies of student cultures and in the UK (e.g. Willis, 1977; Woods, 1979). Moreover, teachers have had added to their specifically teaching roles responsibilities for society’s ‘repair’ functions relating to drugs, alcohol, violence, and now obesity. These, like the basic problem of control, have been systematized through rational action plans and instrumental procedures, but socialization still functions mainly through the culture of teaching.

*Both bureaucracy and professionalism.* This duality was a central concern of early organization theory, based on the assumption that bureaucracy created the structure within which autonomous professionals exercised their knowledge and skills. This interpenetration of bureaucracy and professionalism was predicated on a functionalist view of professions, as adduced from the alleged characteristics attributed to those occupations (e.g. medicine, law) that were conventionally referred to as such. Defining characteristics were a body of systematic knowledge, a lengthy period of higher education, a strong occupational boundary based on credentialism, self-regulation through a legally-recognized professional body, a code of ethics, and a relatively high degree of practitioner autonomy. This Weberian ‘ideal

type' was the model to which semi-professions such as teaching (Etzioni, 1969), aspired through a process of *professionalization*. In relation to teaching, this process was a major objective of the teachers' unions which historically contested the case with the state (Grace, 1987). Teachers were successful in establishing a boundary between the qualified and the unqualified, achieving an extension of the period of professional formation from two to four years, an all-graduate profession, and a role in national policy discussions. A Teachers' General Council was established in Scotland and, later, a similar (short-lived) council was established for England and Wales.

The reform movement ended this period of professionalization. The concept of a profession had been challenged from the political left, on the grounds that the criteria constituted a self-interested ideology which put provider interest above client interest. To a similar challenge from the political right was added the inhibitory effect of the professions, by defending the vested interests of their members, on the operation of a free market. The reform movement in education sought to reverse the professionalization of teaching by enacting policies which led to the deprofessionalization of teaching (from a Weberian perspective) or its proletarianization (from a Marxist perspective). Forms of deprofessionalization spanned removing control over the curriculum—and to some extent pedagogy—from teachers; restricting the power of teacher unions; centralizing teacher education and creating routes into teaching that including school-based preparation (or none); and the regulation of teacher education through national inspection. Perhaps most insidiously, the teaching profession was consistently denigrated through a 'discourse of derision' (Ball, 1990). For Prime Minister Blair, teachers constituted 'a roadblock to reform', particularly those who would not embrace the new scope for the entrepreneurialism in the public sector outlined by Hanlon (1998).

Reformists excoriated the professions while simultaneously engaging in a metaphoric re-description of the term 'professional' and its cognates. 'Professional' was de-coupled from the concept of 'a profession'. 'Professional' came to connote the exercise a specific set of skills in the efficient delivery of a previously-determined service in compliance with an established set of accountability procedures. Thus 'professional' has become a tough no-nonsense term connoting 'efficiency', 'detachment', 'instrumentality', 'delivery'.

Discussion of teaching as a profession has been hindered by a frequent failure to distinguish between two dimensions of professionalization. Above we have been largely concerned with 'institutional professionalization', an occupation's quest for enhanced status, remuneration, and conditions of work. There is another dimension to professionalization which we can term 'practical professionalism' or 'professionalism'. Evidence of its occurrence can be adduced from workplace studies which have explored how teachers coped with the early stages of reform (Woods et al, 1997; Pollard et al, 1994; Helsby, 1999; Osborn et al, 2000). Identifying practical professionalism is difficult as diffuse tasks are repeatedly being converted into specific targets achieved through prescribed routines. But indicatively, Helsby (1999) reports that teachers are less concerned with 'being a professional' than with 'acting professionally'. Hoyle and Wallace (2005, 2007) have suggested some of the ways which teachers 'work round' formal requirements and 'act professionally' through 'the ironies of presentation' and 'the ironies of adaptation'. While some teachers, at least, may engage in a form of 'underground professionalism' in the interests of the perceived needs of pupils, it would be unwise to over-romanticize these practices.

Social, economic and political changes are bringing about significant changes in the character of the professions in both the public and private spheres (Brint, 1994; Dent and Whitehead, 2002; Freidson, 1994; Evetts, 2009). A theme with relevance here is the increase in the number and range of professions, particularly those which are adjunct to the traditional

forms. In education, adjunct-professions associated with regulation and consultancy have emerged. But of particular interest is the professionalization of educational *management*. It is ironic that as teaching was being deprofessionalized, school management was undergoing professionalization by meeting the criteria which had been dismissed in relation to teaching. Teacher professionalism is being increasingly replaced by a managerial professionalism, with the creation of more quasi- managerial roles. It has been accompanied by the institutional professionalization of school management, with reference to traditional criteria such as a body of knowledge, credentials, career structure, a staff college. It might be considered ironic that the criteria so derided when pursued by teachers' organizations are now regarded as a legitimate aspiration for school managers preparing for their task. But there are strong indications that, with the growing emphasis on control over autonomy, a point is coming when we must refer to the two professions: the profession of teaching and the profession of educational management.

### **Organizational Studies as a Prophylactic against *Transformania***

We have argued that where traditional organization studies focus on dualities, they can continue to enhance our understanding of organizations. However, the common assumption that problems flowing from interpenetrative dualities can be resolved through adaptation, balance, or trade-offs is questionable. Two contrasting positions can be taken towards solutions which cannot be achieved through adaptation. One is to move forward relentlessly. The other is to accept the necessity of living and coping with ambiguity. The first of these positions we label as *transformania*, suggesting some of its characteristics. The second position encourages us to explore an aspect of organization theory which originated well before the Baron and Taylor collection. It has remained a largely subterranean stream because it runs counter to the managerialist mind. We examine both positions, starting with

transformania. This is a demonstrably value-laden term, coined to convey the relentless commitment not only to *reforming* but to radically *transforming* the public services. Some characteristics of transformania are as follows.

*Commitment to disestablishing institutions hindering reform.* Examples are the organized teaching profession and local education authorities. An adage in the management literature is: 'If it ain't broke, don't fix it'. The transformational alternative is: 'If it ain't broke, break it!' A reformist Secretary of State for Health claimed that his policy for the reform of hospital management was 'creative destruction'.

*Refusal to learn from history.* Policies cannot be 'read off' from previous history. Situations are never identical and interpretation is invariably involved. It is possible to learn from history (see March et al 1991). But transformania entails the rejection of any history which does not support current policies. To adapt a well-known metaphor, it is equivalent to 'driving without rear-view mirror'.

*Wilful amnesia.* Beyond ignoring history is the deliberate misinterpretation of existing data. Pollitt (2009) explores a number of reasons why evidence is ignored. Pfeffer and Sutton (2006) attribute to 'amnesia' the wilful rejection of bountiful evidence on almost a century of performance-related pay for teachers. It would seem that every successive Secretary of State for Education in Britain enters office assuming performance-related pay to be a sure means of improving teacher effectiveness, despite overwhelming evidence to the contrary. Challenges to this policy are dismissed as stemming from the vested interests of the teacher associations.

*The 'churn' of personnel.* Pollitt (2009) points out that one factor underlying what we have termed transformania is the loss of previous knowledge and experience through reducing the size of the civil service, on the grounds of officials' perceived unwillingness to give unconditional support to transformative policies. To this Pollitt adds the fact that short-

term contracts of ‘special advisers’ lead to their ignorance of extant evidence, or dismissal of evidence as irrelevant, unreliable, and too time-consuming to access.

The need for an alternative position, offering a prophylactic against transformania, results from the ironic unintended consequence of this solution to have generated a proliferation of unintended consequences which belie reformist goals. Transformania is a solution creating a problem. Merton’s (1957) initial exploration of ‘unanticipated consequences’ focused on its ubiquity in social life. We suggest that transformania exacerbates the incidence of this phenomenon through reformers’ refusal to ‘stop digging’. Negative policy (and dire financial) consequences of transformania have been exposed in a growing literature (e.g King and Crewe, 2013).

The nature of this alternative is best understood, at the level of organizational studies, from the perspective of ambiguity theory associated with James March (discussed earlier). Its message is one of intelligent coping and adapting (Lindblom, 1959). A message that is anathema to reformists. But, as March (1999) puts it: ‘Ambiguity...can be seen as a fundamental feature of life, and one that endures despite the best efforts of the reformers and may even be portrayed as having survival advantages.’

The following are some cognates of ambiguity theory, offered here as family resemblances rather than as components of a coherent model.

*Indeterminacy.* This issue is central to the debate about the nature of a profession. Research evidence underlying professional practice has greatly increased in recent years, especially in medicine, and more evidence-informed policies are to be welcomed. Yet there remains a substantial degree of conflict over how to interpret evidence. In parallel, there remains considerable indeterminacy in teaching due to the diffuse and diverse nature of educational goals—despite claims for the holistic nature of education being repeatedly brushed aside in favour of measurable outcomes.

*Equifinality.* This term from systems theory, a variant of indeterminacy, is expressed more colloquially as ‘There is more than one way of skinning a cat.’ Skilled teachers recognize that while there are perennially successful routines, it is also necessary to use methods that fit contingent circumstances since a judicious mixture of methods may meet the needs of individual pupils or entire classes. One can take the teaching of reading as a case in point. Contrary to the belief of most reforming politicians, there is no incontestable best method of teaching reading which can be mandated. It is clear that skilled teachers, aware of the different methods available to them, continue to be adaptive in the contingent circumstances which confront them.

*Dilemmas.* Endemic in organizations, dilemmas may be resolvable through managerial action as choices are made. The dual approach is to acknowledge both horns of the dilemma, and seek an optimal contingent balance. But it is not always possible to do this, and organizational life inevitably involves living with dilemmas. Evidence of how teachers cope with the dilemmas in classroom is to be found in the work of Berlak and Berlak (1981). They found that ‘a teacher can follow different patterns of resolution for different children, and at different times of the year or for different subjects or learning experiences’. The Berlaks’ study was conducted before the era of reform and the problem of dilemmas has now transcended the classroom to entail curriculum, assessment and management.

Woods et al (1997) provide a valuable discussion of the concept of dilemmas and a review of the relevant literature. Their workplace study of the effects on teachers of educational restructuring suggests that dilemmas have proliferated and intensified, and have developed into *tensions* and *constraints* and are now different in *kind*, being more value-based. Woods and colleagues reserve the term *dilemma* for situations in which teachers can use their professional judgment, and reserve the term *constraint* for organizational alternatives over which teachers have no control. Ogawa et al (1999) explore endemic

internal organizational dilemmas (organizational goals, task structure, professionalism and hierarchy) and external organizational dilemmas (persistence, organizational boundaries, and compliance). They note that actions to cope with organizational dilemmas vacillate between alternatives, like a swinging pendulum. It cannot be stopped since there is no stable balance in actions in accordance with incommensurate or changing values. Coping with ambiguity suggests the need for a pragmatic stance—or even an ironic stance (Hoyle and Wallace, 2007, 2008, Wallace and Hoyle, 2012)—whereby rational, or rationalistic, plans are met with a more nuanced approach if the costs of unintended consequences are to be minimized. March and Simon (1958) proposed a concept which is central to the management of organizations and, if acted upon, could be highly beneficial (if unlikely in current circumstances). That is the well-known concept of *satisficing* (a combination of satisfying and sufficing):

Most human decision-making, whether individual or organizational, is concerned with the discovery and selection of satisfactory alternatives, only in exceptional cases is it concerned with the selection of optimal alternatives.

As ever, a telling metaphor is offered. Optimizing involves looking for the sharpest needle in the haystack; satisficing involves looking for a needle that is sharp enough to sew with. There is a developing interest in heuristic approaches to problem solving across the social and behavioural sciences (e.g Gigerenzer et al, 2011).

## **Conclusion**

When the Baron and Taylor volume was published there was an optimism that organization theory could constitute one of the disciplines underpinning new approaches to administration. The form taken then by organization theory did not square well with British pragmatism. Yet the more recent developments of organization theory that embrace the interpenetrative duality of many social phenomena have much more to offer, not least in understanding the

limitations of politically-driven transformania and pointing to strategies for coping and amelioration of its negative effects.

Baron and Taylor acknowledged the value of English pragmatism, a perspective which runs through this paper. Those who take a broader view of education than seeing it as fulfilling only a market function have little prospect of acquiring political power. Any amelioration of transformania will necessarily have to be achieved through influence. We have hinted that amelioration might be sought through the professional activities of headteachers and teachers at the level of the school. They must sustain the logic of confidence through observing the ritual classifications in the interest of the life chances of pupils, the expectations of parents, *and* the careers of headteachers and teachers. Simultaneously, in the face of political demands, they need to pursue an ‘educationist’ agenda. This entails sustaining the school as an institution, in the sense adopted here, and teachers ‘behaving professionally’.

It will strike future historians as odd that the current vilification of teachers targets the group upon which the provision of quality education depends. Positive approaches to the development of the teaching profession have been outlined by, amongst others, Darling-Hammond, (1990); Bottery (2000); Sachs (2003); Whitty (2008); and Gewirtz et al (2009). Much depends on the *professionalism* of teachers: the daily exercise of the knowledge, skills, and duty of care. These are the qualities of which increasingly sophisticated parents are aware, and whose support and trust are essential. There is no evidence that parents, unlike politicians, have lost their trust in teachers as a professional group.

The way in which headteachers perceive and enact their role is vital in preserving a culture of education under the pressures of managerialism. The effects of the professionalization of educational management remain unclear. There is little doubt that it has enhanced basic managerial skills and there is a considerable literature on values, but we

lack research on the *identities* of school leaders (on the general topic of professional identity see Dent and Whitehead, 2002). The pathologies of bureaucracy were long ago explored by Merton (1957) who posited a 'bureaucratic personality type'. There appears to be something of a return to belief in the transferability of managerial skills from one area to another, irrespective of what is to be managed. The problems which this raises is more clear in hospital administration than, so far, in education. As things stand there is the potential danger of a modern-day *trahison des clercs* whereby headteachers trade their educational values for managerial credentials. We hope that those responsible for the professional development of school leaders are aware of this threat, and guard against it by maintaining the fundamental linkage between leadership and its core purpose of supporting education as an institution, in the now more theoretically-informed spirit of English pragmatism.

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