



# Strategy in educational leadership: in search of unity

In search of unity

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## Abstract

**Purpose** – The purpose of this paper is to examine knowledge of strategy within the field of educational administration. It is intended to be the basis for future empirical research and inquiry into strategy in education by suggesting alternate ways of defining and researching strategy.

**Design/methodology/approach** – The study examines the contemporary context of educational administration, the evolution of strategy as an educational construct, its definition and need within educational administration. Using this information the author identifies key conceptual and methodological issues in current research.

**Findings** – The paper finds that knowledge of strategy in education is incomplete and muddled because research and writing in the field have approached strategy from a narrow and conceptually flawed position.

**Research limitations/implications** – The advancement of knowledge in the area will only advance with alternate conceptualisations and methodological approaches.

**Originality/value** – Rather than merely review literature, this paper proposes a redefinition of strategy as an educational administration construct, focusing on key features not words and actions. The hope is that fellow scholars and practitioners will continue to question and focus on the key features of strategy and the issues that confront them.

**Keywords** Management strategy, Leadership, Educational administration

**Paper type** Conceptual paper

## Introduction

Strategic leadership is a critical issue relevant to school leaders that has largely been overlooked, particularly in Australia, in current educational leadership literature. In comparison with other academic disciplines, strategy is a young field. However, strategy as a field of research has grown substantially in scope and influence over the last few decades (Boyd *et al.*, 2005). There were very few empirical studies on the strategic leadership processes or strategic leadership behaviours prior to the mid-1980s (House and Aditya, 1997). Literature concerning the processes through which managers make strategic decisions, and to a lesser extent the behaviour of such managers as leaders' has only recently emerged (Jackson and Ruderman, 1995). Unfortunately there is only a small body of theoretical literature with weak consensus and low levels of productivity (Boyd *et al.*, 2005). The discussion of strategic leadership is still meagre and the domain of studying strategic leadership is relatively diffused and uncharted (Cheng, 2002). There is a bias in existing literature towards strategy formulation (the analysis of strategic content), while limited attention is given to the implementation of strategy (the analysis of strategic process). The emphasis is on prescriptive writing in the field, with an under-concern for description, analysis and



understanding combined with definitional and a conceptualisation problem of what is strategy (Pettigrew, 1988).

Despite the relative infancy of the inquiry into strategy and strategic action, the role of strategic leadership in schools has earned greater significance as a result of the international trends towards school-based management, the changing socio-political environment in which schools operate and the subsequent paradigm shift in the role of school leadership (Eacott, 2006a). Crowther and Limerick (1997) describe strategic leadership as one of the five prominent leadership approaches that have acquired credibility in contemporary educational management theory and practice. Eacott (2006a) stresses that the need for effective strategic leadership in schools is imperative if schools are to continue to meet the needs of their communities.

This paper is not a comprehensive review of strategy in education. Rather, the focus is on the evolution of, need for, and future challenges for the concept in educational leadership. These are discussed with the hope of suggesting new directions that will push the field forward by exploring conceptual and methodological issues. The substantial argument of this paper is that our knowledge of strategy in education is incomplete and muddled because the majority of research and writing in the field have approached strategy from a narrow set of epistemological foundations.

### Definitions of strategy

The practice and concept of strategy have many varied meanings, yet it remains closely related to planning and planning models. Fidler (1996) wrote that the word was beginning to appear in educational management literature in the 1990s, but it was not clearly defined and appeared to mean little more than a general reference to the longer term. The word “strategy” is now applied to almost every management activity to add misleading rhetorical weight (Beaver, 2000). This had devalued and misrepresented the concept and is damaging to both theory and practice. In addition, it has cast doubt over what constitutes strategy.

Tsiakkiros and Pashiardis (2002, p. 6) draw attention to the word strategy and its origin from the Greek word *strategos*, which means “a general and the leader of the army”. This is arguably why much of the literature assigns strategy and strategy development to an individual within an organisation. For example, Johnson and Scholes (2003, pp. 147-8) define a strategic leader as:

... an individual upon whom strategy development and change are seen to be dependent. They are individuals personally identified with and central to the strategy of their organisation: their personality or reputation may result in others willingly deferring to such an individual and seeing strategy development as his or her province.

Very few scholars within the field of educational leadership seek to define the concept of strategy. It remains elusive (Fidler, 2002) and somewhat abstract (Ansoff, 1965). Quong *et al.* (1998) describe it as one of the most frustrating, paradoxical and misunderstood concepts in leadership literature. Frequently the term is used to describe a range of activities (Davies, 2004a) but most often it is explicitly linked with planning (Bell, 1998, 2002). Many of the definitional concerns with strategy begin with its use in the corporate sector. Bush (1998) argues that schools are too different to commercial companies in the nature of their business for direct sharing of concepts. Kelly (2005) argues that business leaders develop strategy, whilst principals develop

people. However there has been some discussion relating to the definition of strategy within the educational context.

Jones (1987, p. 9) articulated a need for strategy in schools through “the ability to articulate a coherent framework or philosophy, a set of over-arching goals which mean something to the members of the whole school community”. This definition alludes to a more conceptual definition of strategy that is not necessarily tied to written planning. However, it could be argued that the definition implicitly implies planning to be central to strategy.

Sanyal and Martin (1992, p. 1) defined a strategy as “the determination of the basic, long term goals and objectives of an educational system, the adoption of courses of action and the allocation of resources necessary for carrying out these goals”. This is a systemic level definition that remains closely tied to the original conceptualisation of strategy in business sector.

El-Hout (1994, p. 55) says, “strategy is very much a state of mind, a way of addressing and making important organisational decisions on a daily basis”. He adds, that strategic thinking “is not just concerned with what, but with why, not objectives, but paths and relationships, not checklists but processes” (El-Hout, 1994, p. 61). This definition removes the direct link between an individual and a plan from the concept. Unfortunately, this insightful definition was not followed up with any further work.

Fidler (1996, p. 1) suggests that strategy is concerned with “the long-term future of an organisation”, but later added, it was “planning a successful future for your school” (Fidler, 1996, p. 19). Whilst originally remaining abstract with the construct, Fidler quickly implies the link between strategy and planning. This effectively creates two aspects of strategy, the first to do with future direction and the second with planning.

Quong *et al.* (1998, p. 10) define strategy as “selecting a destination, figuring out the best way of getting there, then explaining how you have arrived”. This definition of strategy begins to implicitly link strategy with the role of planning.

Watson and Crossley (2001, p. 117) describe strategy from an alternate perspective, emphasising that how a school’s strategy is put together and operated, reinforces or challenges meaning among organisational members. They state that:

Strategy is not neutral or valuefree, but emerges from a melee of organizational vested interests, personal agendas and ambitions, and the utilization of power. From this perspective a reliance upon the concept as an inherently rational and logical process, and a bulwark against the ambiguity of organizational life, is not only problematic but highly questionable.

Leader (2004) stresses, that strategy is a proactive rather than reactive means of translating decisions into actions. Davies (2003, p. 295) stated that strategy was “a specific pattern of decisions and actions taken to achieve an organization’s goals”. He emphasised however, that strategy and strategic planning were not synonymous activities. In 2004 he added that strategy might consist of two sub-concepts, one about the broad major dimensions of the organisation and the other that deals with the medium to longer term. He suggested that instead of being associated with a linear plan, strategy might usefully be thought of instead as a perspective, as a way of looking at things. It provides the template against which to set short-term planning and activities.

Returning to the conceptual definitions of strategy, Kettunen (2005) states that strategy implies the movement of an organisation from its present position, described by the mission, to a desirable, but uncertain, future position, described by the vision.

There has simply been no agreement on a single definition of strategy within education. This is arguable because strategy in education research is multidisciplinary (Brown, 1997) and interdisciplinary (Schendel, 1994; Watson, 1997). This pluralism inherently is subject to the criticism that it does little to foster paradigm development. However, strategy in the educational leadership context is a field of practice and application, where practitioner trends lead the way and scholars are left to play catch up to understand the continually changing context. This renders the field unlikely to ever be governed by a single paradigm. However, what is needed is a conceptual understanding and articulation of the fundamental features of strategy to refocus research and daily educational practices. Whereas previously (Eacott, 2006a) the author has defined strategy as:

leadership strategies and behaviours relating to the initiation, development, implementation, monitoring and evaluation of strategic actions within an educational institution, taking into consideration the unique context (past, present and future) and availability of resources, physical, financial and human.

Current thinking is that strategy should be viewed as choosing a direction within a given context, through leadership, and articulating that direction through management practices. Within this view, there are many elements of strategy, some under the leadership dimension and others the management dimension. Work can then be assigned to either strategic leadership or strategic management or both.

Identifying the key features of strategy as an educational administrative concept removes the need for a prescriptive working definition of “what is strategy?” This is an essential step towards addressing the misunderstanding of strategy and criticism of the concept as an educational leadership construct.

### **The evolution of strategy**

The development of the concept of strategy as an explicit tool for leading and managing an educational organisation is of recent origin in both theory and practice (Eacott, in press). To understand why this origin is so recent, there is a need to examine the school and the school system as organisations.

Schools are large, formal institutions, established by government departments, institutions such as churches or formally incorporated bodies of private citizens with an interest in a form of education (Vick, 2002). Many school systems have developed into highly centralised bureaucracies (Gamage, 1993) frequently with teachers’ unions with a traditional mindset that education is best run from the centre (Dimmock, 1995). However, educational administrative restructuring efforts over the past two decades appear to be part of an attempt to make the management of schools more efficient, accountable and responsive to government policies by introducing corporate management approaches from the business sector, devolving responsibility to regions and schools and placing greater emphasis on educational outputs (Harman, 1991). Governments and education departments are now expecting school principals to possess a practical knowledge of change management, entrepreneurialism in resource acquisition and commercial standards in school accountability (Dempster and Logan, 1998).

Strategy first began to appear in the educational administration literature in the 1980s. However, there was very little prior to 1988 (Fidler, 1989) when the UK passed

the *Education Reform Act*, making it mandatory for all schools to have a development plan. In a recent review of literature on strategy in education, Eacott (in press) found that 90 per cent of the literature emerged following this date and over 60 per cent of works originated in the UK. This legislative change in the UK led to a voluminous literature for the scholar and practitioner on “how to” create a development plan. During this peak period of interest (1988-2000), there were many studies undertaken by distinguished educational management scholars, however the focus became very narrow, primarily on the planning process to the exclusion of other aspects of strategy.

The word “strategy” evolved so many meanings that it became debased and overused (Beaver, 2000). A large proportion of work claiming to be “strategic” in fact represented tactical areas and means to secure operational effectiveness (Drejer, 2004). The planning and programming of the supplementary activities appears to have emerged as “the whole” of strategy (Mintzberg, 1994). Bell (1998) argued that “strategy” and “planning” became synonymous. Practitioners, consultants and academics apply the term “strategy” to almost every management activity. Franklin (1998, p. 313) observed:

The word strategy is bought out under the cover of darkness when writers and speakers, theorists and managers are looking for a more impressive word than “important”. The idea of strategic objectives sounds much more impressive than the idea of business objectives on their own. The idea of a business policy sounds second-rate to the idea of a business strategy. The idea of strategy and its common usage has reified the term so that no self-respecting scholar or manager fails to engage in strategy to other apparently more mundane issues.

Insightful academics realised that many of the concepts and analytical tools used during the formative years of strategy in education research (1988-2000) were not sufficient. However, recognising that there is a need for a new paradigm is a critical first step, but finding one that fits emerging needs is a tedious task. In a 2004 special issue of *School Leadership and Management* (Vol. 24 No. 1) edited by B. Davies, leading scholars including B. Davies, Dimmock, Walker, Caldwell, Leithwood and Fullan among others explored strategy from alternate perspectives. This issue highlighted the need for scholars and practitioners alike to see strategy as more than the pursuit of a plan. Dimmock and Walker (2004) criticised contemporary strategy research for its tendency to connect strategic thinking to improvement planning; the undue attention and focus currently given to particular indicators and criteria as underpinning drivers of strategy and strategic thinking; the tendency for recent literature on strategy to neglect the relevance of the cultural context of each school.

The shift in thinking continued with the National College for School Leadership (NCSL) in the UK-funded project Success and Sustainability: Developing the Strategically Focused School (2005) co-ordinated by B. Davies, B.J. Davies and Ellison. Through this project and related publications (Davies, 2003, 2004a, b, 2006; Davies and Davies, 2004, 2006), they developed a comprehensive framework for strategy in schools comprising strategic processes, approaches and leadership. It produced a series of behavioural characteristics that effective strategic leaders display. Central to these findings was the idea that strategic leadership is not a new theory, but an element of all educational leadership and management theories (Davies and Davies, 2006). Strategy as a concept was a dimension of all theoretical positions.

In contrast to this emerging school of thought on strategy in education, developed through educational research, is a re-emergence of models developed in the corporate

sector. Numerous articles (Bell, 2003; Bishop and Limerick, 2006; Davies and Coates, 2005; Kettunen, 2005) have explored the application of concepts and analytical tools from the corporate sector, such as the Balanced Scorecard or Triple Bottom Line. In this aspect, strategy in education is in a “pre-paradigmatic state” (Kuhn, 1970, p. 10) where rival schools of thought, methodology, and solutions are offered to researchers and practitioners (Franklin, 1998).

By placing the body of knowledge in an historical context, a number of useful conclusions can be drawn (Mercer, 2001; Milliken, 2001). One of the main factors to emerge is a better understanding of why specific research methods have been used to understand a problem. A central mindset in the field of educational administration has been the quest for the essence of leadership, a distinctive set of characteristics possessed by effective leaders (Evers and Lakomski, 1996, 2000) and this has shaped our understanding of strategy in education. People and social phenomena are more complicated than our simple models or theories allow (Waite, 2002) and the know-how of leadership shaped by practical situations (Evers and Lakomski, 2001) has placed the specialisation of strategy in education in a state of intellectual turmoil.

### **The need for strategy**

Griffiths (1985) has raised concerns regarding the unquestioned adoption of terms from the corporate world into educational administration. Thomas (2006) also warns of the seduction of jargon from elsewhere in the field of educational leadership. Kelly (2005) is critical of the role of strategy within education and Bell (1998, 2002) strongly opposes the current strategic planning processes in education. Others have challenged the ability of strategy to meet the needs of educational organisations (Bell and Chan, 2005; Mulford, 1994; Rice and Schneider, 1994), while Forde *et al.* (2000) consider it to be an overrated feature of good leadership. Common to these criticisms of strategy, strategic management and strategic leadership is the central argument that schools are about learning and teaching not corporate management and that corporate models remove the leaders attention away from instructional leadership. This core assumption is conceptually misplaced.

Schools are traditionally viewed as under-led and under-managed organisations characterised by their core business of teaching and learning (Bain, 2000, Dimmock, 2000; Dimmock and Walker, 2004; Weick, 1976). While instructional leadership and/or pedagogic leadership (MacNeill and Cavanagh, 2006) remain the core business of school leaders, strategy is the mechanism for aligning all aspects of the school’s operations in the pursuit of a common goal. Therefore, the two roles are interdependent.

The traditional view of organisations and strategy is to see the organisation as the machine that turns resources into products, and strategy as the instrument for positioning the focal organisation in the industry and marketplace (Løwendahl and Revang, 1998). Unfortunately the self-taught educational leader or even the teaching of strategy within the academy and through consultants is generally from a mechanistic perspective or what Levačić and Glover (1997, 1998) term “technicist-rational” approach. This approach presents strategy to school leaders as a mechanistic pursuit towards the production of a plan. The underlying assumption of strategy and the strategic leader of schools are viewed as “strategic rationality” (Finkelstein and Hambrick, 1996, p. 337). The rationality paradigm is the basis of theories in planning, public policy making, microeconomics, organisational learning and even contingency



theory (Scheerens, 1997). From this perspective, the leader's task is to identify techno-economic opportunities and problems, systematically search for alternatives and make choices that maximise the performance of the organisation. This perspective forms the basis of the criteria from which school development plans in the UK are assessed during inspection (Broadhead *et al.*, 1996; Cuckle *et al.*, 1998a, b; Cuckle and Broadhead, 2003).

This view of strategy is extremely narrow and conceptually flawed. In most organisations, much of the manager's time and attention is given to efforts designed to make the day-to-day operations as efficient as possible. The primary reason given for this is that inefficiencies in daily operations negatively impact on the performance of the organisation. However, organisations depend much more for their long-term success and survival on improvements in their effectiveness (that is, on how well they relate to their environments) than on improvements in their efficiency (Hofer and Schendel, 1978). Drucker (1954) stated that it is more important to do the right things (improve effectiveness) than to do things right (improve efficiency). This suggests that an organisation doing the right things wrong (that is, is effective but not efficient), can outperform the organisation doing the wrong things right (that is, are efficient but not effective). This serves as the over-riding need for strategy within an educational organisation.

Strategy is the key to aligning all school management processes (Fidler, 1989). Through effective strategy, the educational leader can deliberately and purposefully align the organisational structure with the work of the people within the organisation in consideration of organisational performance. It focuses on the creation of meaning and purpose for the organisation (House and Aditya, 1997) and provides an analytic framework to guide managerial practice (El-Hout, 1994). Strategy is the avenue to escape the *ad hoc*, fragmented, piecemeal approach to institutional management adopted by less effective leaders.

### Conceptual issues

Rumelt (1979) contended that the kind of situations that call for strategic thinking and analysis are those that are ill structured and therefore difficult and ambiguous. Weick (1989) argued that it is impossible to construct a theory that is both accurate and simple. As previously discussed, strategy is multidisciplinary, and despite being present in educational settings since the mid 1970s (El-Hout, 1994) and the literature for over 25 years, it still remains strongly associated with rational approaches to corporate management. This has significantly impeded the evolution of strategy as an educational administration construct.

Much of the literature on strategic management and leadership takes a "best practice" approach, identifying the conditions for the successful implementation of strategic management programs (Brown, 2004). Arguably, this is the result of conceptualising "strategy" as a tool for leading and managing an organisation. The original emergence of strategy in educational administration literature was under the title "school business administration" (Jordan and Webb, 1986). It was seen as an analytical framework taken from business and applied within education. In many ways, little has changed. While researchers are beginning to explore more holistic views of strategy (Davies, 2006; Dimmock and Walker, 2004; Eacott, in press; National College for School Leadership, 2005), attempts are still being made to adapt corporate

developed models into educational settings (Bell, 2003; Bishop and Limerick, 2006; Davies and Coates, 2005; Kettunen, 2005). Until the focus of research is removed from the development and implementation of strategic management processes, there will be little construction of a meaningful definition of strategy in education for scholar and practitioners.

The proposed conceptual framework for strategy in education which forms the basis of this paper's proposed path forward has been developed from research and writing in a wide range of contexts, some of which have been indicated. It draws on:

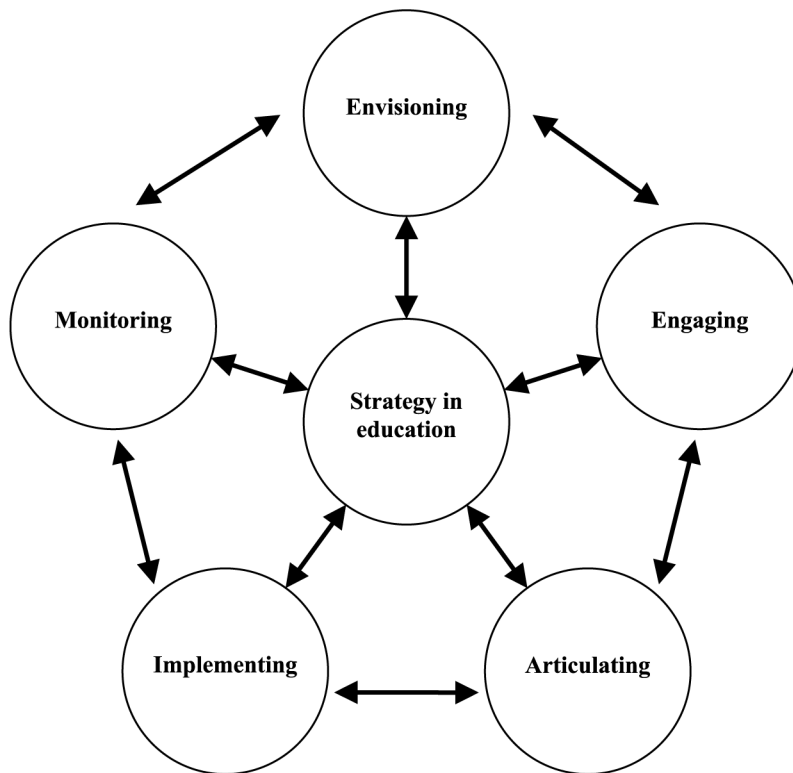
- Research on strategic leadership, change and planning in educational settings by Crandall *et al.* (1986), Fidler and Bowles (1989), Glover (1990), Davies and Ellison (1992, 1997), Pashiardis (1993), Goldring and Pasternack (1994), Fidler (1996, 2002), Middlewood (1998), Cuckle *et al.* (1998a, b), Bush and Coleman (2000), and more recently by Davies and Davies (2006).
- Research undertaken on strategy in the corporate sector by Rumelt (1979), Schendel (1994), Finkelstein and Hambrick (1996), Löwendahl and Revang (1998), Papadakis *et al.* (1998), Lengnick-Hall and Wolff (1999), Westphal and Fredrickson (2001), and Boyd *et al.* (2005).
- Work on strategic thinking and actions by Mintzberg (2003), Boisot (2003), Caldwell (2004, 2006), and Fullan (1993).
- Criticism of the application of strategy in education by Mulford (1994), Rice and Schneider (1994), Bell (1998, 2002), and Bell and Chan (2005).
- Previous work in the current research program by the Eacott (2004, 2006a, b, 2007, in press, forthcoming)
- Analysis of work-based practice by the author while working as a school executive in a number of schools over the past decade.
- The outcomes of a series of workshops with over 300 principals, members of school executive, experienced teachers and graduate students on "the strategic role of educational leaders" in which the proposed framework has been explored and refined.

Consistent features to emerge from this extensive body of work are that the strategic role of the educational leader comprises of five inter-related dimensions represented in Figure 1. This figure emphasises that the strategic role of the educational leader is not linear, but a dynamic and iterative process. However, it cannot be stressed enough that the process of strategic leadership is iterative and movement can occur within any feature of the process at any time.

Envisioning requires the principal and school community to think about the future of the school. When an enrolling parent walks into the school, the staff and other key figures within the school should be able to articulate what the school is striving for and what parents can expect throughout their child's time at the school (Eacott, 2006b).

To undertake the process of envisioning requires critical reflection and reflective dialogue. This reflection needs to form the foundations of strategic thinking, moving the debates from the day-to-day to the future of the school and building in time to discuss and debate where the school is heading. Essential to this process is building metaphors or images of the desired future and ensuring that there is a shared conceptual or mental map of how to get there. There are many different versions of





**Source:** Eacott (2007)

**Figure 1.**

how a school can establish a strategic direction/vision (see Eacott, 2006a), however what is important, is the meaningful involvement of key stakeholders.

This leads into the feature of engaging. Research on effective schools has shown that parental involvement in decision making and activities positively correlates with increased satisfaction and support for the school (Gamage, 1998). Similarly, staff participation is linked to job satisfaction, morale and building trust and confidence in leadership (Timperley and Robinson, 2000).

Engaging requires the school community to have strategic conversations, while often led by the principal, this does not have to be the case. These conversations build on critical reflection, establish purpose for actions and encourage a culture of reflection and dialogue on strategic matters and the future direction of the school. Involving as wide a group as possible provides a richer source of data on the school to inform discussion and debates and if done well, gives others the feeling that their contribution is important, recognised and can make a difference. Effective engagement of others allows for the support, development and/or mentoring of other strategic leaders within the school.

Once the school has a strategy, it becomes the guiding framework for all decisions within the organisation (Eacott, 2004). Decisions made at the organisational, staff, student and community levels need to align with the overarching strategy of the institution (Eacott, 2006b). The systems and structures designed at the organisational level, for example meeting structures; communication systems; and decision-making models, need to reflect the institutions strategy. The professional learning opportunities that are offered to staff, pedagogical practices and annual reviews need to meaningfully reflect the overarching strategy. The expectation of students and their role within the organisation needs to reflect the basic premises of the strategy. In essence, the school's strategy becomes the blueprint for action (Fidler, 1989) or the touchstone to keep the school focussed.

There are three inter-related levels within the articulating dimension: oral, written and structural. Oral articulation involves not only articulating the institutional vision/direction, but also bringing it to life through conversations and dialogue (Davies and Davies, 2006). Written articulation involves distinguishing between daily operations and strategic operations and articulating in writing, a small set of deliverable objectives that the institution can achieve and focus efforts. Structural articulation requires the school to be aligned (e.g. curriculum teams or strategic priority teams) in a manner that is consistent with the strategic direction and integrated into all aspects of organisational life. Dimmock and Walker (2004) discuss this concept from the perspective of the learning centred organisation. An alternate lens for this is purposeful infrastructure.

Implementation is primarily concerned with how the school's strategy can be witnessed. Its central aspect is translating strategy into action, establishing frameworks and ensuring that they become actions. Building on from other features implementation requires that staff understand the school's strategy and maintain a commitment to enacting that strategy. However as with the debate in change management over change versus quality improvement, it is imperative that strategic actions aim to significantly improve current operations by developing the capabilities of others. The timing of implementation is also important. Actions may be sequential or parallel, but desirably, the principal will initiate changes when the school needs them and before external constraints or conditions dictate them.

Because of the iterative nature of strategy as a process, monitoring and evaluation are two crucial elements to effective implementation. The educational leader needs to be constantly asking themselves and others, Where are we now? Where to next? How will we get there? How will we know when we get there? (Eacott, 2006a). There is a need for a transparent system of data collection to enable effective monitoring and predetermined points of evaluation. Pivotal to the success of this dimension of strategy is developing the analytical skills of others to ensure thorough evaluation. Essential elements of this dimension include: systematic monitoring procedures; continuous monitoring; evaluative judgments; and evaluation of the effectiveness of the strategy.

A key feature of the proposed framework for strategy in education is that it is not about strategic leadership or strategic management. Rather than becoming involved in a debate over leadership and management, this framework suggests that the strategic role of the principal is just that, a strategic role. An examination of popular leadership theories leads to an array of strategic actions. Further to this argument is the notion of the "educational strategist". Having moved beyond the strategic leader or strategic

manager construct, why not see the role of the school principal as one of educational strategist, where leadership behaviours and management processes are targeted towards the enhancements of the school's educational programs and most importantly student development. This suggests that the principal can draw on knowledge, understandings and skills from anywhere (including the corporate sector) so long as they are implemented in a manner that is consistent with the purpose and core values of the school. It is here where the principal can have the most significant influence on the development of students.

### Methodological issues

The advancement of any scientific field of inquiry depends on the soundness of the research methodologies employed by its members (Ketchen and Bergh, 2004). Reflecting on papers presented at the 2005 Australian Council for Educational Leadership Conference and his role as Editor of the *Journal of Educational Administration*, Thomas (2006, p. 11) states:

The phenomenon of leadership is, once again undergoing one of its periodic, sustained examinations: definitions of leadership, components of leadership, correlates of leadership, and so on, are occupying more and more journal space and more and more conference time. Yet, therein, lies an emerging danger. Just as the trait approach to leadership in decades past succeeded in identifying a plethora of individual attributes or characteristics fundamental to successful leadership contemporary studies threaten to engulf us with their own tidal wave of descriptor.

Strategic leadership is no exception. Eacott (in press) provides a comprehensive overview of methodological issues in the strategy in education literature between 1980 and 2005. He identified a wide range of methodologies used but stressed that most were retrospective (Elliot, 1999), conducted after the outcomes were known. Van de Ven (1992) pointed out, it is widely recognised that prior knowledge of the success or failure of a strategic change effort invariably biases a study's findings.

Researchers carefully design their studies to observe strategy/strategic leadership in such a way that is "consistent with their definition and theory" (Van de Ven, 1992, p. 181) of strategy/strategic leadership. Therefore while criticism remains that strategic leadership research relies on sterile archive and survey data (Finkelstein and Hambrick, 1996) if investigators' concept of strategy is limited to the mechanistic pursuit of a plan, then document analysis of the plan and survey of the planning process is most appropriate.

Research is inextricably linked with theory; therefore, the misconceptions and ambiguities surrounding theory are reflected in the "interpretation of the meaning and purpose of research" (Hoy and Miskel, 2001, p. 6). Considering that research has tended to follow practitioner trends (e.g. the spike in research following the *Education Reform Act, 1988* in the UK), strategic leadership research has been limited in its selection of unit of analysis to that of a plan or a planning process. Recent trends seem to suggest a move towards an integrative perspective of strategic leadership in education, yet there still remains a requirement for a number of content and methodological refinements (e.g. a move away from small-scale case studies; the analysis of strategic leadership behaviours and practitioner perspectives) to further inform the debate.

As research has focused on a plan or the planning process, the unit of analysis for a large number of studies has been the plan or the planning process to the exclusion of

other strategic activities. Some have attempted to study the process from a teacher perspective (e.g. O'Donoghue and Dimmock, 1996), middle managers perspective (Leader, 2004), or that of the school community (Jones, 1991). There have been attempts to identify aspects of strategic leadership or planning that are effective (Crandall *et al.*, 1986, Glover and Levacic, 1996a, b) or even prescribe strategic actions with a positive affect on school performance (Caldwell, 1992, 1998; Giles, 1998; Pashiardis, 1993; Warnet, 1994). However, the impact of these works has been constrained by the narrow focus of their unit of analysis.

The rich diversity of methodologies present provides a useful guide for designing future studies on strategic leadership in schools. However, a research design cannot be undertaken without a clear conception of what strategic leadership in schools means to the researcher and what theory or theories of strategic leadership are expected to guide the study (Chakravarthy and Doz, 1992). The methods of inquiry applied by researchers shapes the range of results and theories that are likely to emerge (Harris and Beatty, 2004). Small-scale case studies (e.g. Brown, 2004; Forshaw, 1998; Glover, 1990, Hatton, 2001; Hutchinson, 1993; Jones, 1996; Mather, 1998; Saker and Speed, 1996; Thody, 1991; Wallace, 1991; Watson and Crossley, 2001; Wong, 2005) offer valuable insights and illuminate ways of working, but cannot probe or address certain critical questions.

It is evident that scholars studying strategy in educational institutions employ a variety of different theoretical perspectives. This is not surprising, given that there is limited empirical work on strategic leadership and additional concerns relating to the conceptual definition of strategic leadership in the literature. Harris and Beatty (2004) draw attention to the considerable conceptual overlap amongst theoretical positions or models of leadership present in contemporary works. Strategic leadership is present in all theoretical perspectives (Davies and Davies, 2006; Eacott, 2006a) and we are a long way from developing any paradigmatic focus in this sub-field (assuming the field is educational leadership).

### A path forward

A core assumption in this discussion is that the terms “strategy” and “strategic” are used by scholars as proxies representing different meanings, concepts, or dimensions of the leadership and management of educational institutions. Such meanings have included holistic perspectives, types of systems and structures, types of decision-making styles and timeframes of actions. In response to these varied meanings, this paper proposes the need to conceptualise key features of the strategy construct.

The *raison d'être* of strategic leadership and management is to increase our understanding about the determinants of organisational performance and explain how leaders and managers can create superior performance (Meyer, 1991). To achieve this, we need to establish a theoretical base for scholars. However, establishing a theoretical base from which strategy in education researchers can draw to specify testable relationships remains a critical task. Yet, developing a solid theory base would facilitate scholars' efforts to form significant streams of research as part of the pathways to additional legitimacy for strategy in education research and the development of a widely recognised paradigm.

Ireland *et al.* (2005) offer a framework for establishing theory building in strategy. In search of unity Table I provides an adapted version for theory recommendations for strategy in education research.

The challenge is to address important research questions that capture the attention and motivation of “scholars and practitioners alike in the merits of studying them” (Van de Ven, 1992, p. 181). Currently our knowledge of strategic leadership is limited and is mostly based on normative or descriptive studies and on assumptions most of which remain untested (Papadakis *et al.*, 1998).

Several prominent contributors to the field of school effectiveness research have recently made a plea for “more theory” (Mortimore, 1992; Slater and Teddlie, 1991; Stringfield, 1995). Theorists have the largest impact with “simple, powerful, plausible explanations that seem to basically underlie phenomena” (Krathwohl, 1993, p. 649). Scheerens (1997, p. 287) adds that theorising means “going beyond the statement of factors that work and also beyond the modelling of relationships between factors in order to lay bare underlying explanatory principles”. Developing that theory however requires working back and forth between abstractions and a phenomenon (Krathwohl, 1993).

To achieve this requires the undertaking of multiple frames of reference (Van de Ven and Johnson, 2006). Undertaking multiple independent thought trials facilitates good theory building (Weick, 1989). Mixed methods studies offer the potential to build substantial theoretical understanding within the specialisation of strategy in education. By this we mean not merely the use of one method to follow up on data from another method, but a truly integrative investigation of a phenomenon drawing on multiple methods. Tashakkori and Creswell (2007a, p. 4) define mixed methods research as “research in which the investigator collects and analyses data, integrates the findings, and draws inferences using both qualitative and quantitative approaches

Aspects	Recommendations
General theory development	Explicate the how, why, and when of relationships among a set of variables Specify necessary assumptions for testable relationships
Definitional issues	Define strategy in the way it is being used in schools Specify the boundaries of the chosen definition of strategy in schools
Applying theories from other disciplines	Articulate main assertions and assumptions of the theory Discuss applicability to strategy in schools Discuss how the assertions/assumptions remain the same or change when used to form theory-driven testable relationships dealing with strategy in schools questions
Strategy-specific theories	Expand on theories of the strategic school leader and of strategic opportunity Continue to focus on ways to appropriately develop specific theories about strategy in schools

**Source:** Adapted from Ireland *et al.* (2005)

**Table I.**  
Theory recommendations  
for strategy in education  
research

or methods in a single study or a program of inquiry". However, the fundamental issue of the degree to which researchers genuinely integrate their findings has not been addressed to a significant extent (Bryman, 2007). To better address this issue, it is suggested that researcher use a mixed methods question (Tashakkori and Creswell, 2007b) that forces the two sets of findings together. They describe three means of achieving this:

- (1) write specific quantitative and qualitative questions followed by an explicit mixed methods question;
- (2) write an overarching mixed methods question that is then broken down into separate qualitative and quantitative sub-questions; and
- (3) write questions for each phase of the study as it evolves.

The major benefit of mixed methods designs is that they allow for research to develop comprehensively and as completely as possible (Morse, 2004). They provide better (stronger) inferences, with the opportunity for presenting a greater diversity of views, as it is possible to answer confirmatory and exploratory questions simultaneously (Tashakkori and Teddlie, 2003). It is advantageous to a researcher to combine methods to better understand a concept being tested or explored (Creswell, 1994). In addition, through the co-ordination of multiple perspectives, the robust features of reality can be distinguished from those features that are merely a function of the theoretical framework used (Azevedo, 1997). Foskett *et al.* (2005) call for more mixed methods studies in educational leadership. Interestingly, Gorard's (2005) meta-analysis of educational leadership and management journals in the UK found no reports of mixed methods studies.

Drawing on the current body of literature it is possible to find numerous definitions for strategy and strategic in the field. Yet a fundamental question that remains to be investigated is the definition or perception of practitioners. In doctoral work being conducted at the University of Newcastle, Australia, Eacott proposes two fundamental questions: "How do practitioners define strategic leadership in educational settings?" and "How do they enact their strategic role?". Drawing loosely on the principles of grounded theory (Strauss and Corbin, 1990) he proposes to develop a ground up theory of strategic leadership in education that can then be compared with a literature developed model (Figure 1).

There is a well-established school of thought arguing that there exists a considerable gap between espoused theory and practice. Redefining "strategy" and "strategic" in the educational context at the key features level by drawing on scholarly inquiry in the field and practitioner perspectives provides the opportunity to establish the construct within the field and set the parameters of inquiry.

To advance, the specialisation of strategy in education must cumulate knowledge regarding theories that help explain organisational performance and prescribe ways that managers can adjust strategies to improve organisational performance (Carlson and Hatfield, 2004; Rumelt *et al.*, 1994). Contemporary researchers in educational strategy do not start with "clean theories, they have amalgams of assumptions, concepts, ideas and like" (Griffiths, 1998, p. 36). Consequently a wide set of theoretical perspectives are present in the literature (Eacott, in press). Lengnick-Hall and Wolff (1999) highlight that deciding what theoretical perspective to describe or predict strategic circumstances, actions and consequences is a persistent challenge in the field



of strategy research. Elenkov *et al.* (2005) describe three main theoretical perspectives used in the study of strategy: upper echelon theory, full range of leadership (transformational, transactional and *laissez faire*) and visionary leadership.

With the large number of retirements expected among the current stock of educational leaders in the next decade, upper echelon theory (Hambrick and Mason, 1984) is of particular interest. The central logic of Hambrick and Mason's (1984, p. 193) argument is that organisational outcomes need to be viewed as "reflections of the values and cognitive bases of powerful actors in the organization". The basic premise of strategy research has been that senior executives play a dominant role in strategy formulation. The personal background and prior experience (e.g. gender, age, tenure, functional track, formal education) of executives is increasingly recognised as affecting strategy (Westphal and Fredrickson, 2001). Neumann and Finlay-Neumann (1994) add that the leader's personality is likely to have an important impact on both organisational success and growth.

Upper echelon theory has been criticised for linking demographic variables with organisational performance as it creates a "causal gap" (Priem *et al.*, 1999) or an "organizational black box" (Lawrence, 1997). What is suggested here is that rather than linking organisational outcomes with demographic variables, we link the demographic variables to leadership actions (Eacott, 2007). Inquiry into the demographics of educational leaders provides two significant inter-related benefits. For the scholar, it may offer increased power to predict an organisation's outcomes (behaviours, structure and performance). Second, for those who are responsible for the selection and development of educational leaders there may be greater insights into why different leaders enact their strategic roles differently.

Through the re-definition, or establishment of a widely accepted definition of strategy combined with appropriate research designs (balancing the deductive nature of quantitative methods with the inductive nature of qualitative) drawing on theoretical perspectives from both within and outside educational leadership is an essential precursor for developing a strategic educational leadership theoretical perspective and bringing unity to the construct.

## Conclusion

The substantial argument of this paper is that our knowledge of strategy in education is incomplete and muddled because research and writing in the field have approached strategy from a narrow and conceptual flawed position. Educational leadership as a field is removed from "normal science" characterised by organised forums and scientific journals facilitating communication between researchers. It is a field of inquiry dominated by a pragmatic, empirical approach (Scheerens, 1997). The cognitive development of the field remains at the discovery-orientation rather than empirically-oriented studies. There remains a major struggle in the relationship between disciplinary research (educational leadership) and the separate domains of strategy research, the view of strategy as a construct and the balance between criticism and exploration of strategy.

Rumelt *et al.* (1994, p. 1), suggest that "at any time a field of inquiry's frontier was defined by a set of fundamental issues or questions facing it". This paper is intended to be a foundation for future empirical research and inquiry into strategy in education by suggesting alternate ways of defining and researching strategy. The overarching goal

in redefining strategy has been to propose key features not words and actions. The hope is that fellow scholars and practitioners will continue to question and focus on the key features of strategy and the issues that confront them.

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