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An analysis of contemporary literature on strategy in education

SCOTT EACOTT

In this paper contemporary literature on strategy in education is examined in an integrative and analytical manner. To achieve this, an empirical investigation on strategy in education was undertaken. As the goal is to understand and propose specific research directions, the findings are both descriptive and analytical. Initially, peer reviewed journal articles that had been published relating to strategy in education were identified. Such a list provides a valuable insight into contributions to this area of research and serves as the foundation for the paper's other purposes. The second purpose was to analyse strategy in education publications over time (1980–2005), to see how the topic has evolved. Third, an integrative analysis of works on strategy in education allowed an identification of needs for future research. The overriding purpose of this paper was to ensure that there was an understanding of the contributions and their limitations, so that research on strategy in education can progress with an appreciation of the past.

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Introduction

Strategy as an educational leadership construct has been largely overlooked in the literature of the field. However, the role of strategy has earned greater significance in recent times as a result of the international trend towards school-based management; reforms in school governance requiring educational leaders to adopt business-like practices, including developing an organizational vision, strategic planning, marketing, listening to customers and observing market trends, greater autonomy and self-governance altering the educational leadership paradigm, and education systems recognising the need to have leaders trained in management.

The central 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 conceptually flawed position. Educational leadership is a field of inquiry dominated by a pragmatic empirical approach (Scheerens 1997). Cognitive development of the field remains at the discovery–orientation stage, rather than empirically oriented studies. There remains a major struggle between disciplinary research (educational leadership) and the separate domains of strategy research, the

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view of strategy as a construct and the balance between criticism and exploration of strategy.

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. To understand why this origin is so recent, there is a need to examine the school and the school system as an organisation.

Schools are large, formal public 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 teacher's 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 a greater emphasis on educational outputs (Harman 1991). Government 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. This legislative change in the UK led to a voluminous literature for the scholar and practitioner on 'how to' create a development plan. During the 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' has evolved so many meanings that it has become debased and overused (Beaver 2000). A large proportion of work claiming to be 'strategic' in fact represents 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). L. Bell (1998) argued that 'strategy' and 'planning' became synonymous. Practitioners, consultants and academics apply the term 'strategy' to almost every management activity. Franklin (1998: 313) observed:

> The word strategy is brought 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.

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Insightful academics realised that many of the concepts and analytical tools used during the formative years of strategy in education research (1988–2000) were insufficient. Recognising that there is a need for a new direction is a critical first step, however, finding one that fits the 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 Davies, B., Dimmock, Walker, Caldwell, Leithwood and Fullan, amongst 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) criticized 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'. Through this project and related publications (Davies, B. 2003, Davies, B. and Davies, B. J. 2004, Davies, B. 2004b; Davies 2006, Davies, B. J. and Davies, B. 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 that strategic leadership is not a new theory, but an element of all educational leadership and management theories (Davies, B. J. and Davies, B. 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, R. 2003, Davies, P. and Coates 2005; Kettunen 2005; Bishop and Limerick 2006) 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 state of intellectual turmoil where rival schools of thought, methodology and solutions are offered to researchers and practitioners (Franklin 1998).

The need for strategy

Griffiths (1985) has raised concerns regarding the unquestioned adoption of terms from the corporate word into educational administration. Thomas (2006) also warned of the seduction of jargon from elsewhere in the field of educational leadership. Kelly (2005) was critical of the role of strategy within education and L. Bell (1998, 2002) strongly opposed the current strategic planning processes in education. Others have challenged the ability of strategy to meet the needs of educational organisations (Mulford 1994, Rice and Schneider 1994, Bell, L. and Chan 2005, Ponting 2005), whilst Forde *et al.* (2000) considered it to be an overrated feature of good leadership. Common to these criticisms of strategy, strategic management and strategic leadership

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is the central argument that schools are about learning and teaching, not corporate management, and that corporate models move the leaders attention away from instructional leadership. This core assumption is conceptually misplaced.

Schools are traditionally viewed as under-led and under-managed organizations, characterised by their core business of teaching and learning (Weick 1976, Bain 2000, Dimmock 2000, Dimmock and Walker 2004). 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 a 'technicist–rational' approach. This approach offers a strategy to school leaders for a mechanistic pursuit towards the production of a plan. The underlying assumption of strategy and a strategic leader of schools are viewed as 'strategic rationality' (Finkelstein and Hambrick 1996: 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 maximize 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, 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 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 (i.e. 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 thing (improve effectiveness) than to do things right (improve efficiency). This suggests that an organisation doing the right things wrong (i.e. it is effective but not efficient) can outperform the organisation by doing the wrong things right (i.e. it is efficient but not effective). This serves as the overriding need for strategy within an educational organisational.

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 analytical 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.

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Description of the study

Interest in strategy in education has grown in recent years as a result of a variety of environmental and contextual factors impacting on schools. The year 1980 was chosen as the starting point of the analysis because it coincides with Schendel rechristening business policy as strategic management and' consequently' there was little systematic scholarly research on strategy before that date (Finkelstein and Hambrick 1996). The analysis was extended through to 2005, representing a 25 year sample period.

To identify published works, the table of contents and abstracts of each issue of 14 different educational leadership and management journals were searched. Articles that were judged to address at least some component of strategic leadership, as broadly defined for this research, were selected. The journals selected were chosen as a cross-section of peer reviewed journals with an impact on educational leadership and management research and practice, with a particular focus on Australia. Unlike the business sector, where a study by MacMillan (1991) identified 16 journals as offering appropriate, significant or outstanding quality as a forum for publication of strategic management research, there is no such list in educational strategic research. Mayo *et al.* (2006) produced a list entitled 'which journals educational leadership professors are choosing?', however, the list contained both refereed and professional journals, and only those from the USA. The selection of journals for this study represents a limitation of the study. However, it provides a basis from which further research can be undertaken enabling a comparison based on journals selected.

The journals selected for this study were *Educational Administration and History* (EAH), *Educational Administration Quarterly* (EAQ), *Educational Practice and Theory* (EPT), *Educational Management, Administration and Leadership* (EMAL), *The International Journal of Educational Management* (IJEM), *International Studies in Educational Administration* (ISEA), *Journal of Educational Administration* (JEA), *Journal of Educational Planning and Administration* (JEPA), *Leading & Managing* (LM), *Perspectives in Education* (PiE), *School Effectiveness and School Improvement* (SESI), *School Leadership and Management* (SL&M), *The Educational Forum* (TEF) and *World Studies in Education* (WSE). This procedure produced a list of 73 works on strategic leadership in schools, however, once multiple articles on the same study were removed the final total was 70 works.

A descriptive and analytical assessment of the literature

In this section research on strategy in education is described in two parts. Initially, the focus is on conceptual issues explored, followed by a discussion of the literature from a methodological perspective. To acquire the necessary data to address these issues the content and nature of 70 works were analysed.

The nature of the study (conceptual versus empirical) is a basic choice, which has to be made by the researchers. Of the 70 articles, 34 (48.6%) were conceptual and 36 (51.4%) were empirical, indicating that theory development and theory testing is occurring simultaneously in the area. In

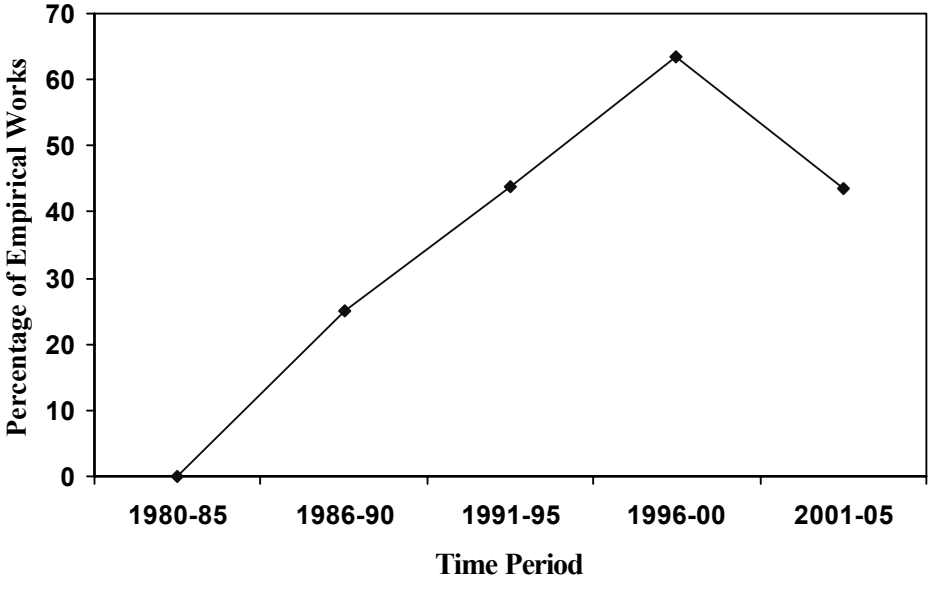

Figure 1. Incidence of empirical works over time

comparison, in the business sector Hambrick (1986), reviewing works from 1980 to 1985, found 46% to be empirical, while Schwenk and Dalton (1991) recorded 60% and Finkelstein and Hambrick (1996) recorded 75%. Figure 1 displays the incidence of empirical works over the time frame of the surveyed sample for education.

The incidence of empirical works increased dramatically during the 1990s. A major contributing factor was legislative changes in England, most notably the Education Reform Act, 1988. This act made it mandatory for schools to have a 'school development plan'. This legislation gave particular emphasis to rationally planned strategic choices (Law and Glover 2003). A number of works have investigated the impact of this legislation on practice (see Giles 1995, Saker and Speed 1996, Lumby 1999, McNarmara *et al.* 2002, Bunnell 2005, Davies, P. and Coates 2005). As the majority of the empirical work in the sample originated in England (61.1%, $n = 22$), the impact of this legislation cannot be over looked. Other countries where work in the sample originated include Australia, Ireland, the USA (each with two), Israel, Pakistan and Norway (each with one). There were two multi-national studies and two that were unclear in origin.

Additional factors influencing the output of works relating to strategic leadership included changes in the editors of journals. B. Fidler, author of two works in the sample (Fidler 1998, 2001) and a further four books or book chapters (Fidler 1989, 1996, 2002, Fidler and Bowles 1989) on strategic leadership in schools, was editor of *School Leadership and Management* from 1995 to 2003. During that period 12 articles (17.1% of sample) were published. Following the change of editors at *School Leadership and Management*, from B. Fidler to A. Harris, B. Davies guest edited a special issue on 'strategic leadership', featuring seven articles. B. Davies was the author, with

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Ellison, of six works (Davies, B. 2004a, 2004b, Davies and Ellison 1998a, 1998b, 1998c, 2003a, b&c) (n = 9.6%) in the sample. B. Davies was also the author of a number of books on strategy in schools (Ellison and Davies 1990; Davies, B. & Ellison, 1992, 1997, 1999, 2003a, b & c, Davies, B. J. and Davies, B., 2006). T. Bush has taken over as editor of *Educational Management, Administration and Leadership*. He is the author of a book (Bush and Coleman, 2000) and a book chapter (Bush 1998) on strategic leadership in schools and this may or may not influence contributions in the journal during his editorship.

Despite searching 14 different journal titles, only a small set of journals emerged as the dominant outlets for publishing works (see Figure 2). It is difficult to ascertain the reasons behind such a pattern. This suggests that the research interests of the editor may, on average, have a positive publishing effect on articles within that field of inquiry. However, there is insufficient data to confirm this interpretation and the hypothesis would require confirmation in a more specific follow-up study.

Journals relating to educational leadership, management and administration tend to take a generalist approach to leadership, without a specific focal point and consequently changes in editor or context (e.g. legislation) may lead to different trends in the published work.

A final point of interest is who is writing about strategic leadership in schools. Of the 70 works in the sample, a total of 89 individual authors are cited. Whilst some authors consistently work together (e.g. Davies and Ellison and Cuckle and Broadhead and laterly including Levačić and Glover), it is of interest to list the most frequently cited authors (see Table 1).

The nine most frequently cited authors are responsible for a total of 21 works in the sample, representing 30% (B. Davies and Ellison worked together on three works, Glover and Levačić on four and Cuckle and

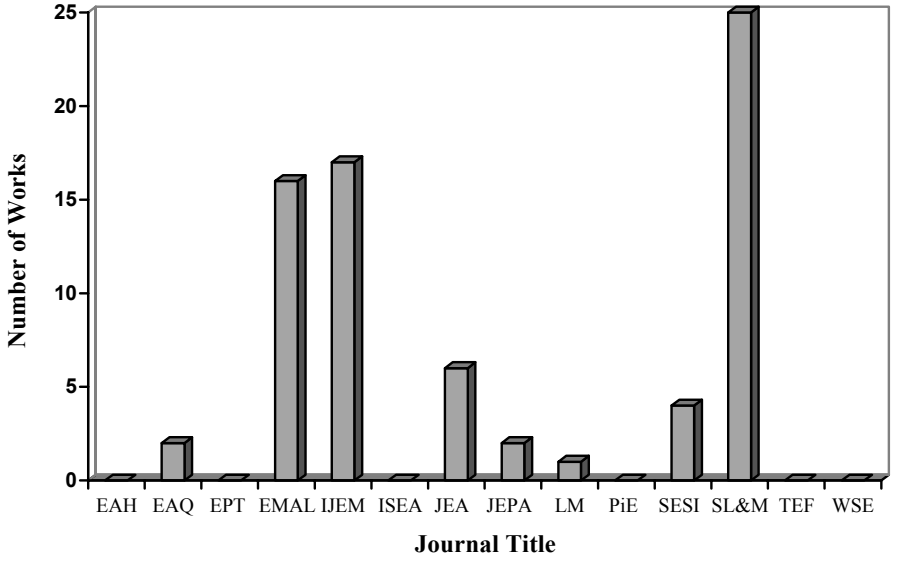

Figure 2. Publication outlet

Table 1. Most cited authors in sample

Author	Times cited
Davies, B.	6
Glover, D.	5
Levačić, R.	4
Pashiardis, P.	4
Broadhead, P.	3
Cuckle, P.	3
Caldwell, B	3
Ellison, L.	3

Broadhead on three). Whilst the sample drew on a large number of authors from a variety of journals, the bulk of works on strategy in education come from a relatively small set of academics published in a small set of journals.

Conceptual issues in the literature on strategy in education

Rumelt (1979) contended that the kinds of situation that call for strategic thinking and analysis are those that are ill structured and therefore difficult and ambiguous. Weick (1976) argued that it is impossible to construct a theory that is both accurate and simple. Strategy is multidisciplinary and, despite having been 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 leadership construct.

Much of the literature on strategic management and leadership takes a 'best practice' approach, identifying the conditions for successful implementation of strategic management programmes (Brown, P. 2004). This is arguablythe result of conceptualising 'strategy' as a tool for leading and managing an organisation. The original emergence of strategy in educational leadership 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. Whilst researchers are beginning to explore more holistic views of strategy (Dimmock and Walker 2004; National College for School Leadership 2005, Davies 2006, Eacott 2006), attempts are still being made to adapt corporate developed models to educational settings (Bell 2003, Davies, P. and Coates 2005, Kettunen 2005, Bishop and Limerick 2006). Until the focus of research moves 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. Whereas previously the author (Eacott 2006) 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.

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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. Similarly, B. J. Davies and B. Davies' (2006) framework of strategic processes, approaches and leadership could be applied.

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 in addressing the misunderstanding of strategy and criticism of the concept as an educational leadership construct. A common critique of the role of strategy within the educational context is that it is less important that instructional leadership and merely a bureaucratic activity imposed by supervisors. However, despite effective schools research concluding that effective schools have instructional leaders, the concept is ambiguous and is measured subjectively, often on reputation (Goldring and Pasternick 1994). Whilst 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. L. Bell and Chan (2005) argued that the direction of most educational policy is justified as a means of achieving greater economic development and a competitive economy, however, the interdependence of strategy and instructional leadership allows for truly authentic educational leadership in schools. Removing the conceptual constraints of seeing strategy as a bureaucratic activity allows the educational leader to harness the combined energy of the entire organisation in improving instruction.

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Definitional concerns

Despite the strong ties with planning, the practice and concept of strategy has many varied meanings. 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 has 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: 6) drew attention to the word strategy and its origin from the Greek word *strategos*, which means 'a general and 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: 147–148) defined 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 administration seek to define the concept of strategy. It remains elusive (Fidler 2002) and somewhat abstract (Ansoff 1965). Quong *et al.* (1998) described 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, B. 2004b), but most often it is explicitly linked with planning (Bell, L., 1998, 2002). Many of the definitional concerns with strategy begin with its use in the corporate sector. Bush (1998) argued that schools are too different from commercial companies in the nature of their business for a direct sharing of concepts. Kelly (2005) argued 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: 9) articulated a need for strategy in schools through 'the ability to articulate a coherent framework or philosophy, a set of overarching 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: 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 the business sector.

El-Hout (1994: 55) said 'strategy is very much a state of mind, a way of addressing and making important organisational decisions on a daily basis'. He added that strategic thinking 'is not just concerned with what, but with why, not objectives, but paths and relationships, not checklists but processes' (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 by any further work.

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

Quong *et al.* (1998: 10) defined strategy as 'selecting a destination, figuring out the best way of getting there, then explaining how you have arrived'. This definition of strategy began to implicitly imply the role of planning.

G. Watson and Crossley (2001: 117) described 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 stated that:

> Strategy is not neutral or value free, but emerges from a melee of organizational vested interests, personal agendas and ambitions, and the utilization of power. From this perspective a reliance

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> 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) stressed that strategy is a proactive rather than reactive means of translating decisions into actions.

B. Davies (2003: 295) stated that strategy was 'a specific pattern of decisions and actions taken to achieve an organisation's goals'. He emphasized, however, that strategy and strategic planning were not synonymous activities. In 2004 he added that strategy may 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) stated 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, R. B. 1997) and interdisciplinary (Schendel 1994; Watson, T. J. 1997). This pluralistic position is inherently subject to the criticism that it does little to foster any paradigmatic development. However, strategy in the educational leadership context is an area of practice and application where practitioner trends led the way and scholars are left to play catch-up to understand the continually changing context. This renders the construct unlikely to ever be governed by a single definition. However, what is needed is a conceptual understanding and articulation of the fundamental features of strategy to refocus research.

Unit of analysis

For research on strategy in education the selection of a unit of analysis is a critical conceptual choice that may have implications for the theoretical development of an article (Finkelstein and Hambrick, 1996). Unit of analysis proved a difficult lens through which to examine the literature in the sample. In the corporate world the unit of analysis used in strategy research may include chief executive officers, executive teams, boards of directors or entire firms. In contrast, the works surveyed in the sample primarily focus on plans. This represents a significant flaw in research on strategy in education. Focusing solely on a plan or the planning process implies that strategy is merely the formulation of a strategy (commonly referred to as 'strategic process research'). This excludes other aspects of strategy, such as strategic choice, implementation, evaluation and cycles. This limited scope in the research fails to develop and contribute to the debate of what is strategy. With the exception of B. Davies and B. J. Davies (2004) and other sporadic examples (see Murgatroyd 1991, Leggate and Thompson 1997, Neumann and Neumann 1999, Dimmock and Walker 2004) the focus on an inanimate object (a plan) restricts strategy research and teaching to a mechanistic perspective.

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Theoretical perspectives

Present day researchers in educational administration do not start with 'clean theories, but rather have amalgams of assumptions, concepts, ideas and the like' (Griffiths 1998: 36). Consequently, a wide set of theoretical perspectives were present in the sample literature. Lengnick-Hall and Wolff (1999) highlighted that deciding what theoretical tools to use to describe or predict strategic circumstances, actions and consequences is a persistent challenge in the area of strategy research. Elenkov *et al.* (2005) described three main theoretical perspectives used in the study of strategy: upper echelons theory, the full range of leadership (transformational, transactional and laissez faire) and visionary leadership. Heck and Hallinger (1999) and Gurr (2002) discussed how transformational leadership is the dominant leadership view, at least in recent times, in education. The vast majority of work in the sample, however, made no explicit links to the three theoretical perspectives described by Elenkov *et al.* (2005) (Caldwell, 2004, is an exception).

Alternative theoretical perspectives used include the balanced scoresheet (Bell, R. 2003, Kettunen 2005), whole school design (Dimmock and Walker 2004), Johnson and Scholes' (1988) strategic management model (Tsiakkiros and Pashiardis 2002), control theory versus chaos theory (Hargreaves 1995) and school-based management (Glover 1990).

It is evident that scholars studying strategy in education employ a variety of different theoretical perspectives. This is not surprising, given that there is limited empirical work on strategy in education and limitations with the definition of strategy. Harris and Beatty (2004) drew attention to the considerable conceptual overlap amongst theoretical positions or models of leadership present in the literature. B. J. Davies and B. Davies (2006) highlighted that strategy is not a new categorisation of leadership, but a key dimension of any leadership activity. From this perspective strategy is present in all theoretical perspectives of leadership. Nevertheless, it also indicates that we are a long way from developing any focus in this area, something that may bring more coherent knowledge generation (Pfeffer 1993) and advance the strategy in education construct.

Causal models

Finkelstein and Hambrick (1996: 333) defined causal logic as 'the underlying set of relationships among major constructs that form the basis for propositions tested, generated, or implied'. Causal models present predicted relationships between administrator behaviours and outcomes variables in a variety of ways (Pitner 1988). These are present in both conceptual and empirical works, as most works either propose a relationship or test a particular relationship. Finkelstein and Hambrick (1996) used four constructs (strategic leadership, environment, firm performance, organisation form or conduct) to conceptualise causal models in strategy research. For this analysis strategic leadership refers to any aspect of leadership by the principal (whether characteristics or behaviours). The environment is defined as any

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external stimulus on the school (e.g. contextual changes, legislation, marketplace uncertainty). Organisation form and conduct includes all aspects of the school that are not part of the strategic leadership construct. Performance refers to the school's effectiveness, as indicated by such factors as enrolment, examination results and student learning.

Using these four constructs to distinguish the causal models used in strategy research it is possible to classify causal models into four categories: as an independent construct, dependent construct, moderator construct or both an independent and dependent construct (Finkelstein and Hambrick 1996). Strategic leadership as an independent construct implies that strategic leadership has an effect on performance or organization form or conduct. When portrayed as a dependent construct implies that the environment, organisation form or conduct or performance affects strategic leadership. Strategic leadership as a moderator construct implies that strategic leadership when linked with a second construct affects a third construct. Portrayed as an independent and dependent construct simultaneously implies that strategic leadership effects strategic leadership. Weick (1995) explained how strategists act, and in doing so they create the constraints and opportunities they encounter. Pondy and Mitroff (1979: 17) defined strategic leadership as an 'enacted phenomenon', one where the strategist plays a major role in producing the market they face. Table 2 provides a breakdown of the different types of relationship examined or proposed in the works identified in the sample.

It is evident that strategy has been most frequently modelled as a dependent construct, especially as dependent on the environment. This analysis shows that the research on strategy in the sample with a clearly identifiable causal model viewed the environment and strategic leadership as closely

Table 2. Types of causal models

Types of causal model		No. of works
Strategic leadership as an independent construct		16
Strategic leadership	Organisation form or conduct	7
Strategic leadership	Performance	9
Strategic leadership as a dependent construct		19
Environment	Strategic leadership	14
Organisation form or conduct	Strategic leadership	4
Performance	Strategic leadership	1
Strategic leadership as a moderator construct		11
Environment and Strategic leadership	Organisation form or conduct	1
Environment and Strategic leadership	Performance	4
Organisation form or conduct and Strategic leadership	Performance	6
Performance and Strategic leadership	Organisation form or conduct	0
Strategic leadership as an independent and dependent construct simultaneously		5
Strategic leadership	Strategic leadership	5

Some works were assigned to more than one category.

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aligned. Unfortunately, it was unclear what causal model was used in some of the works (n = 26, 37.1%) as many simply describe/propose a strategic planning process. Analysis such as this has the potential to broaden our understanding of how strategy effects and is affected by organisational constructs.

In summary, the analysis indicates that the primary conceptual characteristics of research on strategy in schools have yet to exhibit any stability over the last 25 years. The concept of strategy remains misunderstood and is commonly poorly applied. However, recent works indicate a shift towards a more integrated conceptual model of strategic leadership in schools. The elusiveness of strategy as a concept has posed considerable issues for researchers when selecting a unit for analysis. The conceptual framework provided by B. Davies and B. J. Davies (2004) should signify a shift towards the strategists who make strategic decisions rather than the eventual document they produce. This will allow better analysis and testing of causal models in the area within a more integrated view of strategy in education. When these themes are brought together the picture of strategy in education that emerges is far more complex than the prescribed rational model of strategic management. It is characterised by constraints, limitations, flaws and biases similar to those faced by the practising strategists on a daily basis.

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Methodological issues in the research on strategy in education

The advancement of any scientific field of inquiry depends on the soundness of the research methodologies employed (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: 11) stated:

> 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.

Strategy in education is no exception. A wide range of methodologies have been used to study strategy in education, however, most are retrospective (Elliot, 1999), conducted after the outcomes were known. As 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.

Appreciating the issues raised above, researchers carefully designed their studies to observe strategy/strategic leadership in a way that is 'consistent with their definition and theory' (Van de Ven 1992: 181) of strategy/strategic leadership. Therefore, whilst the criticism remains that strategic leadership research relies on sterile archive and survey data (Finkelstein and Hambrick 1996), if the 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 to theory, therefore, the misconceptions and ambiguities surrounding theory are reflected in the 'interpretation of the meaning and purpose of research' (Hoy and Miskell 2001: 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 units 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 number of content and methodological refinements required (e.g. a move away from small-scale case studies and the analysis of strategic leadership behaviours and practitioner perspectives) to further inform the debate.

As in the previous section on conceptual issues, the focus is on a small number of key characteristics describing the research methods employed in the work: data sources, sample size and the theoretical model and timeframe of the study. As this section focuses on methodological issues, it only analyses empirical works (n = 36).

Data sources

Data sources have been categorized into four types: archival/document analysis, observation, interview and questionnaire. Each empirical work was assigned to at least one of the four types of data source. Data derived from questionnaires was most frequently employed (44.4%, n = 16). Observation was the least frequently employed data source (13.9%, n = 5). Finkelstein and Hambrick (1996) acknowledged the difficulty of studying strategy through observation, primarily because strategic leadership/management behaviours and their results are only evident after a time delay. They also inferred that strategy research may suffer from a reliance on sterile archival and survey data. However, interviews were used to collect data in 41.7% of the studies, and interviews were often used in collaboration with a questionnaire or archival data (22.2%, n = 8) to provide a richer picture in some studies. Table 3 shows the frequency of data sources used in the sample.

Sample size

The sample size used in the empirical research on strategic leadership in schools varied immensely. The largest sample size within the sample was a

Table 3. Data source

Data source	Times used
Archival/document analysis	9
Observation	3
Interview	15
Survey/questionnaire	17
Unclear	11

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Table 4. Sample size by data source

Data source	Smallest sample	Largest sample	Unclear	Average sample
Archival/document analysis	53	120	0	90
Observation	5	5	2	5
Interview	4	47	2	18
Questionnaire	20	505	1	181

questionnaire returned by 505 participants. The smallest sample was five participants. A moderating factor on sample size was the data source. As data sourced through observation is generally more difficult to obtain, the expectation would be for smaller sample sizes. In contrast, data sourced through document analysis or questionnaires was easier to obtain and consequently a larger sample size might be expected. Table 4 displays examples of sample size cited in the sample.

Theoretical model and time frame of the study

Finkelstein and Hambrick (1996) critiqued strategy research for using models and methods that are too static. Empirical works from the sample have been examined in relation to the dynamism embedded in the research. They have been viewed in light of two dimensions: (i) the extent to which the theoretical model is static or dynamic; (ii) whether the data used in the research was cross-sectional or longitudinal.

Table 5 combines the two dimensions to offer an integrated portrayal of the dynamism of research on strategy in education. It is apparent that the majority of works are both cross-sectional and static, a pattern used by the majority of works on strategy as surveyed by Hambrick (1986), Schwenk and Dalton (1991) and Finkelstein and Hambrick (1996). Cross-sectional methods have remained the predominant mode of analysis in empirical strategy research since its inception (Bowen and Wiersema 1999).

In summary, several key methodological attributes of the empirical work in the sample have been documented. Empirical research on strategy in education is relying more on questionnaire and interview research than document analysis and observation. A wide range of sample sizes was present in the sample and cross-sectional/static theoretical models and timeframes were most common. Although not present in sufficient numbers in the study, the use of statistical techniques (exceptions include Wallace, 1991; for matrices, Miles and Huberman, 1984; computed but unclear how,

Table 5. Number of empirical works arrayed by theoretical model and time frame of the study

	Static	Dynamic
Cross-sectional	26	0
Longitudinal	5	5

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Goldring and Pasternack 1994, for SPSS, MacGilchrist and Mortimore 1997, for SPSS and LISREL 8.20, Midthassel *et al.* 2000, for cyclical thematic analysis, Radford *et al.* 2003) is a methodological choice of interest. Whilst it is unclear whether technologies will yield original insights (Finkelstein and Hambrick 1996) they may be of assistance to limit the constraints of traditional approaches and help with the robustness of the research . Analysis of the works through a methodological lens presents an area of inquiry with many alternative explanations, frequently so emersed in one aspect of the phenomenon (the planning process) that it excludes the phenomenon as a whole. Greater methodological transparency in works in the quest for 'objectivity' and 'sophistication' within studies is needed to provide greater insights into strategy in education.

The goal in this section was to document and discuss the key conceptual and methodological attributes of strategy in education research over the past 25 years. Using the analytical components to provide information on where strategy research has been, the analysis will be used to offer guidance on where we need to go. In the following section the analysis is used as the raw material for synthesis.

Synthesis

The analysis presented in this paper has highlighted the conceptual and methodological attributes of contemporary literature on strategy in education. However, as a result of the different disciplinary and historical roots of researchers the main models that have developed are from the ground up, as fragmented middle range theories rather than as lower level theories stemming from an integrated overview of strategy (Farjoun 2002). Consequently, each of the research programmes has focused on a slightly different aspect of strategy. In synthesising the findings it is essential to return to the major research questions of the study.

What are the content and foci of contemporary literature on strategy in education?

When viewing the sample through a conceptual lens strategy is predominantly related to planning. Farjoun (2002) described the core issues of strategy as: the concept of strategy; causal models relating strategy to other constructs; models of strategic management and choice. The bias towards planning (i.e. models of strategic management and choice) represents a significant flaw in the literature. This may be due to the lack of an operational definition for strategy in education. Difficulty in developing an integrative operational definition for strategy/strategic leadership is compounded by the very nature of strategy.

A wide range of theoretical perspectives were present, however, rarely were there any explicit links made. Causal models were unexplored in the majority of works. By and large theoretical differentiation has considerably restricted the recognition of multiple and reciprocal causality between

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different elements (Henderson and Mitchell 1997). The underlying assumptions of strategy were most frequently that of a technicist-rational approach (Levačić and Glover 1997, 1998), which is consistent with a research design aimed at the strategic planning process. Overall, the limited scope of content and foci of studies has limited the understanding of strategy in education to a rational, linear perspective of the planning process.

What methodological approaches have been employed?

A wide range of methodologies were present in the sample, however, most studies of strategic leadership in schools were retrospective, conducted after the outcomes of actions were known. Van de Ven (1992) pointed out that it is widely recognised that prior knowledge of the success or failure of a strategic change effort invariably biases a studies findings. Most of the studies included only a subset of possible determinants, raising the 'potential for bias due to omitted variables' (Boyd *et al.* 2005: 943) and analyse data at a single point in time.

Appreciating the issues raised above, researchers carefully designed their studies to observe strategy/strategic leadership in a way that is 'consistent with their definition and theory' of strategy/ strategic leadership (Van de Ven 1992: 181). Therefore, whilst the criticism persists that strategic leadership research relies on sterile archive and survey data (see Finkelstein and Hambrick 1996), if the 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. As with the content and foci of studies, a more integrative means of studying strategic leadership in schools will call for alternativee or mixed methods to be applied in the search for greater understanding.

Conclusions

This paper sets out to identify and answer four key questions: what are the content and foci of contemporary literature on strategic leadership in schools; what methodological approaches have been employed; what can we learn from an analysis of this work; what does this analysis tell us about the future direction of research on strategic leadership in schools? Having reviewed the content of 14 prominent educational leadership journals a series of conceptual and methodological priorities have been raised. Research programmes attempting to address these priorities offer significant opportunities to make important contributions to knowledge about strategic leadership in schools phenomenon.

There are many other important topics that could be explored regarding strategic leadership in schools (e.g. what makes an effective/ineffective strategic leader, generic strategic leadership behaviours with a positive effect on schools). However, having drawn on the literature and informed speculation (in an attempt to build theory and even more to encourage theory building)

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the following section outlines a research agenda designed to begin to address the concerns raised in a synthesis of the literature.

Future research directions

As demonstrated by the sample in this research, clear research priorities warrant renewed or focused attention if the study of strategy in education is to evolve beyond its initial focus on the mechanistic production of a plan. Further development of strategy in education as an area of study requires the development of key features of strategy and not specific words or actions.

A fundamental question that remains to be investigated is the perception of practitioners of strategic leadership in schools, questions such as how they define strategic leadership in schools and how they enact their strategic roles? Drawing loosely on principles of grounded theory, research into the understanding of and attitude to strategic leadership in schools of practising principals would allow the development of a conceptual framework which can then be compared with that prescribed by the literature. Trim and Lee (2004) argued that grounded theory is relevant to management researchers. Additional support comes from Cassell *et al.* (2006), Crompton and Jones (1988), Denyer and Tranfield (2006), Ketchen and Bergh (2004) and Van Maanen (1979). Grounded theory was the dominant paradigm of educational administration for 20 years, before faltering in the 1970s, when it failed to deliver the anticipated theories (Maxcy 2001).

However, Van de Ven *et al.* (1989) discussed how, without studying strategy from a managers perspective, it becomes difficult (if not impossible) for an investigator to understand the dynamics confronting managers and, thereby, generate new knowledge that advances the theory and practice of strategy. Bogden and Biklen (1992) stressed that within the goal of better understanding human behaviour the use of a participant perspective is necessary to achieve a more thorough understanding of the phenomenon.

Hambrick and Mason (1984: 193) argued that organisational outcomes—both strategies and effectiveness—need to be viewed as 'reflections of the values and cognitive bases of powerful actors in the organization'. Theory and research on strategy has increasingly suggested that the choices made by executives are influenced by the personal background and prior experience of top managers (Westphal and Fredrickson 2001). Rather than adopting the traditional approach of identifying characteristics displayed by effective leaders and not by less effective leaders, it is proposed that we study strategy from the perspective of demographic background. Similarly to the way that situational leadership proposed leading differently based on context, this proposed perspective attempts to explain leadership as a result of the leader's background.

Overall, study of the practitioner perception of strategic leadership and the importance given to strategic leadership behaviours through a demographic lens will provide leadership theorists, particularly educational leadership theorists, systemic authorities and practitioners, i.e. school leaders and scholars who grapple with the enormous complexities posed by strategic leadership, with a knowledge and understanding of strategic leadership that

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may hold greater promise to positive leadership within specific contexts. More importantly, the findings of this research could be a significant addition to the existing stock of knowledge and understanding of strategic leadership in educational contexts. This paper, which emphasises practitioner perceptions and demographic profiling, is intended to be a foundation for future empirical research.

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