

# Strategy as Leadership: An Alternate Perspective to the Construct of Strategy

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**Abstract:** *Since the seduction of business rhetoric into the field of education, dating back to at least to Taylorism in the early 1900s, school leaders have shaped themselves as organisational managers and leaders. Terms such as ‘strategic’ have been introduced to add misleading rhetorical weight to activities. But what do we mean by ‘strategic’? Scholarship on strategy in schools and strategic leadership by principals has tended to spike following the enactment of policies such as the Education Reform Act in the UK. This has led to a narrow perception of what it means to be strategic, and legitimised modernistic thinking entwined with Romantic ideals. In this paper, I argue the case for a new conceptualisation of strategy. Strategy as leadership puts social practice back into educational leadership. This paper was written, as is arguably the case of a special issue, to serve as the stimulus for further discussion and debate in the quest of advancing our understanding of what it means to be strategic.*

## Introduction

In his introduction to a 2004 special issue of *School Leadership & Management* on strategy and strategic leadership in schools, Brent Davies declared a shift in thinking about strategy in education from the historically conservative perspective of strategy as a management function to that of strategy as a leadership process. While the notion of a leadership ‘process’ is still problematic, and arguably evidence of an underlying mechanistic assumption of leadership, the intention of the claim is clear. For him, this represented a move away from the early emphasis on school development planning built on legislative reforms such as the *Education Reform Act* (1988) in the UK. However, as Ladwig so adeptly reminds us ‘it is quite possible (and plausible) to see alternative stances take up positions on the periphery of a field at the very same time as the core or centre changes little’ (1998: 35). To this point, I argue that the major source of critique for the study of strategy within educational leadership, management and administration is the limited representation of what is strategy.

In this paper, I shall argue that scholarship on strategy in education has failed to ask the question ‘When and how does strategy exist?’ Discussion centred on this existential question is beyond the current discourse on strategy in education, yet by not understanding the existence of strategy it is impossible to know what it is to be strategic. The somewhat uncritical adoption of the term strategy from the business sector and the narrow definition applied to it within the field of education leadership has constructed a particular identity with a specific associated stance towards scholarship and practice (see Bell 1998, 2002, 2004)

for a critique of the construct of strategy in education). As a consequence, I further argue, current research on strategy in the field of educational leadership limits its own potential by attempting to provide a micro-level description of leadership behaviours and traits. In this light, there exists a need for scholarship to move beyond modernistic thinking and embrace the complexity of ever shifting cultural, social and political relationships. However, if the initial agenda set forth by this paper is to be met, and if a wider audience of educational leadership researchers and practitioners are to be persuaded by these insights, an alternative conceptualisation of strategy is needed. My own 'strategy as leadership' is one such alternative.

## A Theoretical Framework for Strategy

In his opening chapter of *Homo academicus* Pierre Bourdieu distinguishes between 'real' individuals and those individuals who become known through social analysis (empirical and epistemic individuals, respectively). Working from this conceptualisation, I argue that 'strategy' remains something that happens between people, but when constructing a lesson for the field (through a manuscript), the effects of making objects out of 'real' people and their interactions is clearly objectifying. The process of analysis hides that which it seeks to uncover.

Much of the research in the field of educational leadership finds its *raison d'être* in what many believe to be the key mission of professional schools (e.g. education, business and nursing); that is, to develop knowledge that can be translated into skills that advance the practice of professionals (Simon 1976, Kondrat 1992, Van de Ven & Johnson 2006). This professionalisation of knowledge has been a barrier to the effective linking of knowledge claims and action (Lagemann 1997) in educational leadership and education in general. Theory and practice are construed as distinct kinds of knowledge. While complementary, they possess different ontological (truth claims) and epistemological (methods) perspectives for addressing problems of practice. In an attempt to address the theory–practice nexus, many researchers have sought to produce work that will help educational leaders in their daily activities. The preoccupation with the 'real' work of educational leaders, demonstrating ties to functionalism, has positioned scholarship on strategy in education as a problem-solving tool for managers in educational institutions. In doing so, it has not emphasised the many subtle ways in which cultural, social and political forces, both individual and organisational, might influence practice.

Rather than derive a sophisticated conceptualisation of practice from social theorists such as Bourdieu (1977) or Foucault (1977), the research agenda of strategy in education has utilised a narrow and under-theorised view of practice. It has limited itself to 'what people do', restricted to the bodily movements of actors and the functional implications of such actions. This sociologically naïve (Carter, Clegg & Kornberger 2008) and underdeveloped conceptualisation of practice fails to engage with the discursive nature of social interactions. After all, Sun Tzu, a Chinese military strategist, made the point some 3,000 years ago that all men can see the tactics whereby I conquer, but what none can see is the strategy out of which great victory is evolved. Bourdieu's focus on the indirectly accessible elements of social relations offers an alternative and potentially illuminating lens for exploring the strategic role of educational leaders. For Bourdieu, strategy is not conscious, individual, rational choice, rather appropriate actions taken without conscious reflection. His focus on practice, the structure of the social space and the *habitus* of social actors is also helpful in the (re)conceptualising of the strategic practices of educational leaders.

## Strategy as Leadership

There are many studies that seek to conceptualise the context of educational leaders and their strategic actions. Whether the principles of strategy are attributed to Johnson & Scholes (1988), Deming (1982), Andrews (1971), Taylor (1911) or a more historical figure such as Sun Tzu (1963), the basic tenets of strategy have been centred on the questions: Where are we now?, Where do we want to go? and How do we get there? However, I believe there are two main flaws in this conceptualisation. The first is a failure to acknowledge the historical dimensions of action; the second, the underdevelopment or unpacking of the multi-layers of the cultural, social and political environment.

Any social science which fails to take into account history will be inherently defective (Fay 1994). Bourdieu argued that the 'feel for the game' (the central principal of his conceptualisation of strategy) exhibited by good players is the product of a practical sense of the logic and necessity of the game, acquired through experience of the game (Lamaison & Bourdieu 1986). Leadership actions – whether they are in a school, corporate entity or even a classroom – are the combination of consciousness (a calculation of the current stimulus) and the unconscious (a product of personal history). The ahistorical interpretation and reporting of leadership actions does little more than provide a thin description of behaviour. In doing so, inquiries make a critical error which Marx referred to as taking the things of logic for the logic of things. The distinction that exists here is between acting and having a reason, compared to acting because of that reason. Fay writes:

The distinction that is relevant here is between acting *and* having a reason and acting *because* of that reason. In the former case an agent may have a reason for his behaviour, and it may therefore have been a rational and justifiable thing to have done. But unless the having of this reason was the cause of the agent's acting as he did, the reason does not explain the act, i.e. it does not show the act occurred because the agent had the specified reason. (1994: 92)

Despite impeccable methodologies, an underdeveloped positioning of activity within the cultural, social and political environment applies an *a priori* filter which thwarts any meaningful understanding that can be derived of action. The study of any particular leader, school or even school system independently, without acknowledging the position one holds within the broader educational and societal structures and roles, is extremely limiting. By ignoring the crucial fact that a leader is situated in the social space that is education in any region, state or nation (or even globally), and that the leader owes much of his or her distinctive constitution to the relationships he or she holds with others, the initial conceptualisation of leadership all but destroys that which it seeks to study.

Many scholars ignore the temporal features of strategy, and leadership for that matter. Yet, as discussed above, it is vital to acknowledge that the social structures and interactions that a researcher studies at any given time are the product of historical developments and struggles that require analysis. Strategy is always a work in progress; however, the determination of strategies is a piece of social construction that takes place in an already structured space of significations, privileges and practice (Carter, Clegg & Kornberger 2008). For Bourdieu (1977), failure to recognise the notion of time is to abolish strategy. Brent Davies and colleagues have regularly acknowledged the impact of timing on strategy. Davies and Davies (2005) highlight the need to determine effective intervention points – simply, doing

the right things at the right time. Davies (2006) expands this by calling on the work of others and his own research to suggest that knowing what not to do (Kaplan & Norton 2001) and when to abandon a course of action are equally important. Parikh (1994) also suggests that intuition (the unconscious) plays as large a part as rational analysis (the conscious).

An analysis of the timing of actions is vital to advancing our understanding of strategy. Just as the social space represents a point in time, the product of historical and contemporary struggles and developments, any action represents a decision, integrating both the conscious and unconscious, based on timing. The good player, or strategist, understands the social space, a combination of both experience and rational choice. Understanding the social space requires an interpretation of the 'state of play', working at the meso-level (greater society) macro-level (systemic, organisational) and micro-level (interpersonal). Hamel & Prahalad (1989) cite the example of a fast-tracked manager at GE whose success quickly declined when confronted with a Japanese competitor whose managers had been working in the specific area for a decade.

Regardless of ability and effort, fast track managers are unlikely to develop the deep business knowledge they need to discuss technology options, competitors' strategies, and global opportunities substantively. Invariably, therefore, discussions gravitate to 'the numbers', while the value added of managers is limited to the financial and planning savvy they carry from job to job. Knowledge of the company's internal planning and accounting systems, substitutes for substantive knowledge of the business, making competitive innovation unlikely. (Hamel & Prahalad 1989: 74–75)

Sadly, in education, the situation is not that different. The purpose of schooling is a highly contested terrain with many different points of view. However, what remains clear, and Callahan (1962) provides a valuable historical analysis of this, is that schools are and will continue to be assessed, ranked and funded based on the numbers. Stephen Ball (2000, 2001, 2003) has written extensively on this topic under the banner of 'performativity'. In the highly complex pedagogical and pastoral context of contemporary education, schools are evaluated on numbers alone, usually standardised test results, because no other basis for dialogue exists.

While educational institutions often operate within large bureaucratic structures and rigid regulatory frameworks, the strategic leader is able to move beyond the blind conformity to rules to enact leadership strategies. Through a sense of the social space and a strong grounding in the temporal features of actions, the good player is able to 'take liberty with the official rule and thereby save the essential part of what the rule was meant to guarantee' (Lamaison & Bourdieu 1986: 113). However, this apparent freedom to improvise based on the infinite possible moves within the game has the very same limits as the game. Strategies appropriate for leading the public primary school, which do not involve the need for profit and a reduced threat of closure, may not be suitable for leading an early childhood centre where there exists a necessity to maintain enrolments and cover operating costs. However, the constraints and limitations applied by systemic structures are reduced as the leader's level of strategy is increased. As Bourdieu notes:

Nothing is freer or more constrained at the same time than the action of the good player. He manages quite naturally to be at the place where the ball will come down,

as if the ball controlled him. Yet at the same time, he controls the ball. (Lamaison & Bourdieu 1986: 113)

## Empirical Support

In recognition that the 'feel for the game' of educational leaders is not directly accessible, within a larger study (Eacott 2008), principals ( $n=36$ ) as part of a semi-structured interview were asked to identify an analogy which best summarised what their current experience of the role was like. These analogies give narrative access to knowledge that the principal might not be able to express in terms of the conventional language of the field, consistent with the Bourdieuan notion that the logic of practice is not directly accessible. The two most common analogies involved sailing (getting to a destination and organising people) and sporting teams (participation and win or lose as a team). One analogy (see below) provided by a participant exposed the indirectly accessible features of the strategic role. Rather than portraying the role in a manner consistent with the literature of the field, this analogy begins to explore the relational and interconnected elements of the role. It brings to the fore the leader as an active participant in a social interaction. There is a reciprocal relationship between leader and follower, and performance is not static. The strategic role experiences ebbs and flows, and success, following Bourdieu, requires an understanding of the logic of the game.

It [the strategic role of the principal] is probably like a very good sexual relationship long term, because it is long term and its where people are equal and its not always easy and its not always what you want and what you feel like, but its something that can be really exciting, you want to work on it, but if you're not involved in it, you're not going to enjoy it. But it can't be something where someone else can do all the hard work for you and you go hey yeah, this is great, because that doesn't work, it's that team work and that people are engaged together and being a part of something. It can be sort of full on and other times have nice sort of gentle lulls that you enjoy. (Eacott 2008: Principal 36)

Throughout the analogy there is an underlying assumption of the need to understand the social space. This involves the enactment of unconscious assumptions, a working knowledge of the value placed on those behaviours by your partner and the power relations within the relationship. The past experiences of the two actors have established a history of acceptable behaviours. These norms of behaviour serve as the boundaries of the game. While there are an infinite number of possible moves within the relationship, past experiences have created a 'relationship culture'. This is not to suggest a rigid set of rules or procedures for the game, as strategy requires innovation; rather, it (the relationship culture) exists as an unconscious guide for actions. This unconscious guide is developed through sustained interactions between the actors and is constantly evolving. Comments such as 'where people are equal', 'it can't be something where someone else can do all the hard work for you', and 'that people are engaged together' expose the invisible power relations. While at any given moment it may appear that one person is dominant, overall (as this analogy focuses on a macro-level analysis of the relationship rather than a micro-level analysis of individual behaviours) both parties are equal in the development of the relationship.

The reference to the 'long term' moves the notion of strategy beyond the means–end usually applied to strategy. In doing so, any snapshot of strategy in practice is similar to trying to

capture someone's life story in a single photograph. Comments such as 'it is not always easy', or 'what you want or feel like', and 'it can be sort of full on and other times have nice sort of gentle lulls' highlight that any moment in time during a long-term relationship is the result of historical and future struggles which cannot be directly accessed in that moment. The individual significance of any given event or action is but one element on an ongoing continuum of historical events and actions, and future events and actions. A single snapshot is an unreliable predictor for future success due to its ahistorical assumptions. Even if a relationship was to end, the history that each individual actor takes with them continues that history. This experience forms the unconscious behaviours of the future.

The normative nature of the field's literature provides many lists of leadership behaviours and traits. These lists and neat frameworks seek to provide a form of codified rules or explicit norms for practice. However, in reality, such as demonstrated by the above analogy, things are much more complicated and the infinite possibilities of actions cannot be captured in tables, models, diagrams or neatly packaged explanations of adjectival leadership. The good long-term sexual partner, just as the good player or actor, has a natural sense of the game. Bourdieu notes:

The good player, who is as it were the embodiment of the game, is continually doing what needs to be done, what the game demands and requires. This presupposes a constant invention, an improvisation that is absolutely necessary in order for one to adapt to situations that are infinitely varied. This cannot be achieved by mechanical obedience to explicit, codified rules. (Lamaison & Bourdieu 1986: 113)

## A Methodological Stance

What I offer below is to be taken as points for consideration in the development of the strategy as leadership agenda. They are points which should be further debated and discussed, arguably the rationale behind a special issue on the topic. In fact, if any further debate or discussion takes place on the strategy as leadership agenda it will have served its purpose. They build on what I see as two critical flaws in contemporary research, the prevalence of retrospective work and the under-theorisation of methods.

Retrospective inquiry limits our understanding of leadership and particularly strategy. The success or failure of any action is going to create a bias in sampling and the interpretation of the inquiries' findings. The over-reliance on studying the effects of positive leadership and the failure to include less-successful leadership leads to a situation where the findings are not able to distinguish between what the more effective leader did and the less effective leader did not. In the bias towards the remarkable, researchers have sought to make explicit the moves of successful leaders rather than the underlying principles of successful leadership practice. Following Bourdieu, I suggest that it is the directly inaccessible features of strategic leadership which distinguish performance, and that the underlying influences that bring about actions will not be forthcoming at the level of discourse being used in the majority of educational leadership scholarship.

Prasad distinguishes a method as a tool or technique that is used in a process of inquiry, whereas methodology is an 'intricate set of ontological and epistemological assumptions that a researcher brings to his or her work (1997: 2). Yet, many times, the text that follows the heading methodology in journal articles is little more than a description of the methods applied in a study. By failing to acknowledge the ontological (claims about truth) and epistemological (methods) assumptions of their work, researchers fail to elucidate how they

see strategy and educational leadership, which would then allow a reader to make an informed judgement of the work.

The assumption that our work fits neatly into the quantitative, qualitative or the increasingly popular mixed-methods approach is extremely naïve. Rather than pigeon-holing our work into such simplistic paradigms, we should instead focus on the selection of methods based on our theoretical understanding of strategy and leadership. Our methods should reflect a deep conceptual understanding of theory and a level of analysis which allows the research to inform others. In this way, audience plays a role in research. We should be clear on who we are writing for and why. If the goal is to advance our understanding of the phenomena of strategy in the educational context then our work must reflect the theory(ies) of the field(s). A failure to do so will limit our work to blind empiricism and it will be of little value to anyone.

### **Where Does this Fit?**

Theoretically, questions of 'truth' and 'reality' under the strategy-as-leadership banner are consistent with the positions articulated by many well-known philosophers, social theorists and epistemologists. As with Scheurich (1994), I contend that how we see (epistemology) and what we see (ontology) are interwoven. However, such a stance challenges the positivist notion that research is conducted by impartial, detached, value-neutral subjects, who seek to uncover clearly discernable objects or phenomena. By failing to acknowledge the epistemological and ontological features of work, researchers have done themselves a disservice. In order to overcome this, there is an urgent need to acknowledge and articulate our epistemological and ontological positions in our work. Such grounding will allow for critical engagement with ideas, from which debate and discussion can help in the advancement of knowledge.

Academically, I should probably point out that the criticism I have directed at previous scholarship on leadership in education is written in what Townley (1994) would label the 'spirit of friendship'. My critical attitude is based on a genuine respect and profound appreciation for the criticised work, much of which coming from scholars whose position and standing far exceed my own. My intention is not to disregard all that has gone before; however, the proposal of the strategy as leadership perspective is characterised by dissatisfaction and restlessness with current discourse. Ladwig (1996) among others suggests that research is pedagogical. Therefore, a key question to ask is 'How much would we understand about education if we understood everything there was to know about strategy in education?' Using conventional wisdom on the topic, I would say very little. The production of countless lists of behaviour and traits and document analysis of strategic plans does little more than tell us what should or is happening in schools. Real strategic actions (empirical) are lost in what has become known as strategic leadership through analysis (epistemic). Research into strategy as leadership is focused 'in education' as opposed to 'related to education' (Ball & Forzani 2007). The central focus of strategy as leadership is the leadership of education in educational institutions. Research on strategy as leadership would therefore focus on and probe the special phenomenon that is education. While arguably drawing from related disciplines, although the very need to have disciplinary boundaries is worthy of debate, the core features of strategy as leadership are 'central to education and require a unique knowledge of and appreciation for the importance of educational transactions' (Ball & Forzani 2007: 537).

Professionally, the preparation of future leaders (both practitioners and scholars) is of vital importance. However despite concerted efforts by education systems and universities, there remain distinctions in the enactment of leadership. For me, this raises the question as to whether leadership can be taught. Returning to Bourdieu, he discusses strategy as existing this side of the unconscious but not necessarily from consciousness. The enactment of strategy as leadership is a point-in-time social action. The conscious actions of agents can be shaped and moulded through professional development, including traditional training and development, but this can only take the agent so far. The conditions for 'rational calculation almost never obtain in practice where time is scarce, information limited, alternatives ill-defined, and practical matters pressing' (Bourdieu 1988: 783).

Durkheim (1977) wrote in *The Evolution of Educational Thought* that the unconscious is history, and this is especially true in the case of strategy as leadership. The unconscious, which Bourdieu discusses as *habitus*, is the agent's sense of the social game, a sense that is acquired beginning in childhood through participation in social activities. The good strategist is one who understands the game, a combination of conscious thought and unconscious understanding of the game. On the most practical of levels, the good player is 'anticipatory' (Lincoln & Guba 1985: 142), producing an effect in anticipation of its cause, so that they shape the future, or at least a history not yet written, rather than merely react to the present. Good leaders have a combination of professional knowledge built from experience (unconscious) and explicitly developed tools or problem-solving techniques (conscious). Not an entirely controversial claim, but one which challenges conventional ways of knowing in educational leadership.

## Conclusion

For a whole variety of reasons the scholarship of educational leadership has a reputation for being deeply conservative. However, if we wish to make the world a better place, and arguably this should be the purpose of the social sciences, than conservatism is not the path to renewal or profound change. To change educational leadership practices, one has to change the ways of understanding; that is, the construction of knowledge relating to educational leadership and the social interactions in which actors engage.

The preoccupation of strategy in education research to focus on strategic planning is a curious one. The very notion of strategic planning finds its roots in an industrial economic origin, arguably Taylor's scientific management. While it remains unclear exactly what this has to offer the field of educational leadership, apart from the continued push towards corporate managerialism in education, the boundaries that this places on the intellectual development of new perspectives is clear. As a field, scholars and practitioners alike have allowed policy statements, such as the *Education Reform Act* (1988) in the UK, and the literature of the field to dictate what strategy means and, subsequently, what it means to be strategic. Many practitioners and scholars are more familiar with strategic planning than they are with strategy. However, as Mintzberg (2003), Hamel & Prahalad (1989) and others remind us, to act strategically is not merely to create a new way to conduct our current operations but instead to completely rethink the very nature of our operations. As such, if we are to act strategically in our research, we need to rethink how we (re)conceptualise strategy and the strategic in our attempts to advance the knowledge claims of the field. We need to change the 'terms of engagement' (Hamel & Prahalad 1989); that is, following Rapp (2002), we must commit to looking beyond the current perceived elites and loudest voices of the field that situate themselves and a somewhat narrow narrative of what is strategy in

education to establish not competitive advantage but competitive innovation. Simply, we need to expand the concept of strategy in education beyond the scorecard currently adopted by the majority of scholars and practitioners in the field. After all, despite the emergence of strategy since the late 1970s, the overall competitiveness of Western economies globally has gradually wilted.

In the contemporary higher-education context, one which 'rewards, regulates, and requires *authority and originality*' (Ladwig 1996: 102) through such schemes as Excellence in Research for Australia and the Research Assessment Exercise in the UK, educational leadership scholars are arguably at their most critical junction since the adoption of a scientific (although it could be argued pseudo-scientific) research agenda since the early 1900s. The attachment of credit to ideas and reputation-building that are the currency of the academic assure a personalised competitiveness in the marketplace of ideas (Hunter 1990). Note the clear links between strategy (and particularly competitive advantage), the world of the academic and the need for a strategic approach to both the content and the process of our work. If educational leadership scholars, and particularly those engaging with the construct of strategy, wish to have status and credibility within the wider academy, change is required. This need not be by individual actors (although it does need to start somewhere, so why not this special issue?), but by the actors within the field at large. It is on this basis that I make the argument for a more social investigation of the strategic role of educational leaders, one that seeks out the indirectly accessible features of leadership practices and views these actions within the social space in which they occur, and is mindful of the temporal influences and resourcing of subsequent actions.

An influential theoretical contribution, one which commands widespread intellectual attention, will make visible much of the underlying assumptions of actions. Lesser educational leadership scholarship operates with naïve, taken-for-granted conceptions, or with old theories that have passed into common discourse, such as that involving people in decisions that directly affect them will lead to better outcomes for all. Educational leadership scholars at their best have been constructing social theory, although they have not always discussed it as such, and have interwoven it with their own particular historical description. As educational leadership is a social activity, and I challenge anyone to say otherwise, any theoretical arguments relating to educational leadership are dealing with social practice. What is needed is a sophisticated conceptualisation of practice and not the objectified lists of behaviours or traits that can be measured for frequency and compared to distinguish effective from less effective practice. This paper is intended as a step towards developing such a sophisticated conceptualisation of strategy as a social practice. While this paper has offered a blueprint for further study on the strategic role of the educational leader, it remains for the reader to accept the challenge. Doing so will enable important new insights into, and understanding of, the strategic role of educational leaders (not to mention educational leadership in general), the actions they take and the performance that they deliver.

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