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A Middle School Strives to Achieve Team Leadership Through Opposition and Uncertainty

Kathleen J. Martin

Janet H. Chrispeels

From the beginning of her tenure as Paramount Middle School principal, Chris Morris wanted to involve teachers in the decision-making process of the school.¹⁻³ She wanted an “advisory team sharing their knowledge” to help make important decisions and to gather information that would inform those decisions. Toward this goal, she created the School Leadership Council (SLC), and from this council emerged the School Leadership Team (SLT). Under her leadership, Chris envisioned the faculty and staff working together as a team in which “everyone would have equal weight in their decisions.” This was to be the beginning of a new form of leadership at Paramount Middle School, unlike what teachers and staff had seen in previous years. Sharing leadership responsibilities is something that “I believe in. . . . I really feel the more teachers and staff members are empowered in decisions, the more you get buy-in,” she said. As Peter Senge (1990) indicates, however, making “changes in infrastructure, like reorganizations and

changes in reward systems, often have far less impact than expected" (p. 40) and can be difficult to achieve when environmental, organizational, and intergroup factors conspire to thwart the process.

This chapter focuses on the actions Chris Morris took as principal of a middle school to fulfill her goal of shared decision making. It also presents the personal uncertainty she wrestled with as she attempted to achieve her vision for Paramount Middle School and the opposition she encountered from district administration, leadership team members, and staff. We examine how relationships among the superintendent, principal, and SLT contributed to ambiguity and conflict for the principal as she endeavored to clarify her own role and achieve an empowered school leadership team. Often attempts at shared leadership are not as straightforward as implied, and the concept of "team" suggests that together the team "can accomplish more than the sum total of the individuals involved" (Professional Development Seminar, 1996). We highlight the many complex interactions that emerge as the teachers and principal work to implement bottom-up reforms that challenge traditional patterns of interaction and leadership at the school and in the district.

Wrestling With Shared Leadership

Schools throughout the United States and many other countries are implementing various forms of shared decision making and establishing site-based management (SBM) teams or committees (Clune & White, 1988; Hargreaves & Evans, 1997; Johnson & Pajares, 1996; Malen & Ogawa, 1988; Wallace & Hall, 1994; Wohlstetter, Smyer, & Mohrman, 1994). Although the desire to incorporate effective shared decision making is widespread and has been presented as the optimum form of leadership for more than ten years, school systems continue to wrestle with defining and implementing SBM to ensure that school self-governance influences teaching and learning practices. Boards of education want self-governance that improves student learning, but the link between SBM and student achievement has been shown to be tenuous and often indirect (Malen & Ogawa, 1988; Marks & Louis, 1997; Smylie, Lazarus, & Brownlee-Conyers, 1994). The establishment of teacher leadership teams creates new roles and relationships for teachers and principals within schools and between the school and the district. Leadership teams also must cope with multiple reforms, rapid changes in district or site leadership, shifting policies, and environmental factors that affect their schools often in ways beyond their immediate control. They are expected to change established patterns of behavior while simultaneously running the school and succeeding with students. Such

changes in social position can often contribute to role ambiguity and role conflict (Bertrand, 1972; Biddle, 1979; Kahn, Wolfe, Quinn, Snoek, & Rosenthal, 1964). Furthermore, if district policies or practices are unclear or contradictory, the conflict can undermine team effectiveness, lead to open hostility or withdrawal, and diminish the potential of the team to bring about student learning. If teachers and administrators display ambivalence about decision-making opportunities or feel frustrated with the lack of needed skills and information, the sense of empowerment essential to effective decision making may be undermined (Fuhrman, 1993; Hart, 1994; Johnson & Boles, 1994; Weiss, Cambone, & Wyeth, 1991).

Efforts to empower teachers and establish shared decision making demands new knowledge and skills and clarification of rights, obligations, and expectations of who should be involved. Few studies have investigated the relationships among team, principal, and superintendent as they each assume new roles and shift their responsibilities. In addition, although training is seen as important, research has not explored how training may enhance role clarity and understanding or contribute to role ambiguity and conflict. In this chapter, we explore the principal's, superintendent's, and team members' perceptions about shared decision making and the ways these perceptions impact their work and their roles at the school. We examine the ways the principal and School Leadership Team (SLT) cope with issues of conflict and ambiguity as they attempt to implement school reforms and participate in a three-year team training program. Most important, we examine a history of district and school events and the ways these events impact relationships and the potential for the school to establish shared decision making (Chrispeels, 1997).

Getting Acquainted With School Leadership

Paramount Middle School and the School Leadership Team Program

Paramount Middle School is located in a small suburban, semi-rural district in Southern California. The district serves 3,100 students in one high school, one middle school, and four elementary schools. During the late 1990s, the district experienced rapid growth in the student population and was beset by a lack of adequate school facilities. When class-size reductions were introduced, more classrooms were needed in the lower elementary grades, which further impacted the existing K-8 facilities. With the recent passage of a school bond measure, the district began construction of a new elementary school, remodeling an existing elementary site, and repairing

the aging middle school facilities. Paramount Middle School serves 700 sixth through eighth-grade students, 54% of whom are Latino and 45% of whom are white. Of the 35 fulltime teachers, 26 are female and 9 male. Four of the teachers are of Latino background, one Asian, and the remainder are white. The 9 sixth-grade teachers work in interdisciplinary teams, but the 26 seventh- and eighth-grade teachers remain in a more traditional departmental structure.

The School Leadership Team Program was initiated in 1993 by the California School Leadership Academy (CSLA) as a statewide capacity-building effort to develop a team of teacher leaders who are able to lead their schools in ways that will result in "powerful student learning" (CSLA, 1996). Each of the 12 CSLA regions in the state recruit schools to participate in this voluntary program. Schools agree to send a team, usually composed of teachers, staff, and administrators, to the regional training sessions five times a year. Team-member selection is left to the discretion of the school, and teams vary in size from 6 to 15 members. Although most teams remain relatively stable for the duration of the seminars, new team members are integrated and welcomed at the training. The teams attend five sessions each year for two (or an optional three) years and pay a small fee each year to cover materials and refreshment costs. Teams are clustered at the training sessions into groups of 5-10 teams within regions to foster collaboration across schools. During the all-day sessions, SLT teams explore themes such as the change process, shaping school culture to support collaboration and continuous improvement, creating a vision of powerful teaching and learning, and designing curriculum and assessment in the service of powerful learning. They learn about group facilitation skills, including problem solving, decision making, conflict resolution, and establishing roles for team members. Active learning approaches engage team members in data collection and analysis, collaborative action research, and curricular and instructional restructuring efforts (CSLA, 1998).

Understanding the Work of the Team and the Role of the Principal

To understand the roles of the Paramount team and the principal, CSLA professional development, and the school and district factors that shaped these roles, we began attending and videotaping SLT training seminars with the team between January 1995 and May 1997. The purpose of the videotaping was to observe the team's development in the seminars over time and to capture the issues the team chose to address. We also conducted audiotaped interviews with Paramount Middle School team members,

teachers who were not team members, the principal, the vice principal, and the superintendent during the spring and fall of 1997 and winter of 1998. The purpose of the interviews was to understand the impact of the SLT program on school actions to meet student needs from the perceptions of the team members as well as others at the school. Interviews were semi-structured so that similar data were collected from each person being interviewed, but they provided ample opportunities for interviewees to talk freely about their experiences and perceptions. In addition to the focused data collection at Paramount in 1995 and 1996, 148 teams participating in the statewide SLT program completed two surveys for each year of training: a 32-item Team Assessment instrument and a 25-item SLT Implementation Continuum. The surveys provided perceptual data about the Paramount team's progress regarding team functioning and accomplishment of the program objectives (Chrispeels, Castillo, & Brown, 2000).

Collection and analysis of the videotapes and interviews took place in cycles, with each round of collection and analysis leading to additional data collection and analysis as new questions emerged. The videotapes were transcribed and analyzed using a computer program called C-video, and the tapes were searched for themes that were common across seminar meetings. These included themes such as role definition; topics most frequently discussed; the impact of training on the team's functioning; and the nature of communication and interaction within the team and with the staff and district administrators.

History of Events, Episodes, and Perspectives at Paramount Middle School

In videotapes of SLT training seminars, team members appeared frustrated about what they perceived to be their ambiguous leadership role and their inability to accomplish the goals they had set for their school. Key events or decision points repeatedly emerged as defining moments for the team, principal, and superintendent. A review of documents associated with the school such as the district's Tentative Agreement with teachers, SLT training materials, and minutes from team meetings surfaced potential contradictions in language about teachers' decision-making roles. Through the use of textual analysis and the key events from the videos, we developed a timeline to purposefully examine events occurring in the district and school between 1992 and 1998 that were recognized, acknowledged, and considered socially significant by the participants (Bloome & Egan-Robertson, 1993; Chrispeels, 1997).⁴ Table 5.1 presents and summarizes a brief chronological history of significant school events that influenced the SLT.

Table 5.1 Chronological History of Significant School Events That Influenced the Paramount School Leadership Team's (SLT) Capacity

	<i>School Year</i> 1992–1993	<i>School Year</i> 1993–1994	<i>School Year</i> 1994–1995	<i>School Year</i> 1995–1996	<i>School Year</i> 1996–1997	<i>Summer</i> 1997
<i>SLT Training and School Awards</i>	Distinguished School Award	Paramount invited to attend SLT training, fall 1994	SLT training, Year 1	SLT training, Year 2	SLT training, Year 3	
<i>School Structure Changes</i>	Paramount becomes a Middle School	Six-period day proposed and accepted		SLT proposes 7th period; rejected superintendent	District changes Middle School designation, moves sixth grades	Principal initiates one lunch period*
<i>Administrative Changes</i>	Jan '93, new co-principal designated	April '93, new sole principal designated		New district superintendent		New assistant principal
<i>Scheduling Changes</i>	Two lunch periods for 700 students initiated			After school tutorial proposed and accepted	Superintendent changes school start time; SLT proposes later start time	Superintendent and principal change school start time One lunch period initiated*
<i>Leadership and Tentative Agreements</i>	School Leadership Council initiated	Initial Tentative Agreement signed		New Tentative Agreement signed		

NOTE. * The move to a one-period lunch was perceived by the principal as a structural change that would promote teacher interaction and collaborative time. Teachers perceived it as a scheduling change

The table is an event map that provides a broad context for examining the history of events at Paramount. Through this history, we present four specific episodes that transpired as a result of proposals initiated by the SLT and that reflect the team's effort to define and carry out its assumed role as decision makers. Fast-paced changes and multiple transitions often complicate existing relationships at schools and contribute to a sense of unease for participants.⁵ Therefore, we also examine the individual perspectives of the superintendent, principal, and team.

History of Events

In 1992, Paramount Junior High School received a California Distinguished School Award, and at the same time the superintendent announced that Paramount would become a middle school the following school year. This meant that the sixth graders would move to Paramount and the ninth graders to the high school. (See Table 5.1 for more on the history of events.) According to interviews with teachers, this announcement about the move came without prior notice or preliminary discussion and was driven by the lack of space to accommodate the sixth graders at the elementary schools as opposed to pedagogy. Over the next several years, this change in configuration had several implications for discipline, student achievement, and communication at the school. When interviewed in 1997 about the change to a middle school, SLT members reported, "there was huge antagonism. It was really a hard change for the school . . . [and] we had many discipline problems."

Chris Morris became co-principal of Paramount in January 1993 and immediately consulted with the faculty on the concept of a School Leadership Council (SLC) to advise her on a wide range of school issues. The teachers accepted the SLC concept and selected representatives from each department. One of the council's actions was to develop a proposal for a six-period schedule (five instructional periods plus one prep period). The teachers viewed this as a major accomplishment for their new SLC. The six-period plan was accepted by the district and implemented in the 1993-94 school year.

In January 1994, the district and the teachers' union signed a Tentative Agreement to "affirm their commitment to shared decision making" in schools throughout the district. The agreement language did not specify the domains of decision making, nor was it clear regarding the nature and extent of the decisions to be made by the school and/or the district. The agreement stated:

Leadership Councils shall be immediately implemented . . . to endorse the concept of continuous improvement for the instructional programs of the District by including teachers in those decisions impacting instruction . . . A Site-Based Governance Committee . . . shall determine which decisions may be reserved entirely to the sites, which decisions are shared, and which decisions are reserved to the traditional decision-making structures of the District

The agreement recognized the importance of training in decision making for both administrators and teachers, yet the district provided neither training nor clarifying information. In reflecting back on this period, the teachers reported that the areas of decision making included personnel, budget, and curriculum and represented a shift in their role from advisors to the principal to one of apparent shared decision makers. They reported feeling uncertain of their responsibilities and confused about how to handle these new areas.

In the spring of 1994, the California School Leadership Academy (CSLA) initiated the School Leadership Team Professional Development Program and invited Paramount Middle School to participate. Chris, a graduate of the CSLA Principal's Academy, welcomed the idea and proposed it to the SLC. They agreed and anticipated that training would help them to develop decision-making and problem-solving skills. In the fall of 1994, they began participating in the School Leadership Team (SLT) program, regularly sending a team of five SLC members and the principal to the training sessions. The SLC consisted of four core members who attended each session and a fifth position filled on a rotating basis by a member of the larger school council. This approach gave all team members an opportunity to attend and participate in SLT trainings. Team members attended 15 training seminars over a three-year period. At the school site, this core group played the lead role in introducing the major episodes (to be discussed below) to the larger SLC.

The 1995-96 school year opened with a new superintendent, Norm Green, who was uneasy with the ambiguous language of the 1994 Tentative Agreement. He negotiated a new contract with the teachers' union that emphasized the principals' responsibilities and authority and decreased the decision-making power of the school site management teams. The contract affirmed the following:

The administration is responsible for certain issues on any site and that the principal cannot relinquish those responsibilities to other individuals or committees . . . [Teachers] must be included in decisions related to educational programs, budgets, staffing, and instruction . . . [and] teachers may desire to participate in certain areas and not in others

The ways in which teachers were to be involved, however, was not clearly specified. The new contract solidified the role of teachers as advisors "included on various committees" and "encouraged to participate," but with little or no decision-making authority, including whether or not the school was to maintain the SLC. The Paramount team continued with a second and third year of training and maintained its leadership role in defining much of the work of the SLC.

In the 1996–97 school year, the district again proposed reconfiguring Paramount Middle School and moving all the sixth graders to a new site due to lack of space. In the following year, the school board approved the change and initiated site remodeling.

Episodes

We turn now to four specific episodes confronting Paramount Middle School from 1992 through 1998 as a way of highlighting core SLT-trained team leadership and problem-solving actions. The episodes represent two main concerns faced by the school and addressed by the SLT team: student achievement in Episodes 1 and 2; and scheduling in Episodes 3 and 4. In each episode, the team presents a proposal designed to change or modify existing school patterns: (1) a seventh period, (2) a study hall program, (3) the number of lunch periods, and (4) the school start time. Together, these episodes provide insight into the interactions among the superintendent, the principal, and the team.

Student Achievement (Episodes 1 and 2)

The SLT initiated two projects to help students who were not achieving success at school. Interviews with team members indicated that the issue of lack of student achievement and low grades were a concern. In the first episode, Superintendent Norm Green rejected the team's proposal due to legal implications. In the second episode, the team was able to accomplish its goal by focusing on a more limited solution designed within school and district parameters.

Episode 1. In the fall of 1995, during Paramount's second year of SLT training, the team proposed a seventh period to provide instructional assistance for students who were receiving D's and F's. Team members and other school staff volunteered to teach the seventh period "because we were so anxious to see if it makes any difference with these kids." The principal, as a team member, was involved in the development of this proposal, and she submitted it to Superintendent Green. He rejected it on the grounds that

it violated the California Education Code to require some students to stay at school longer than others

They perceived the rejection as a lack of district support. Team members indicated they did not meet with the superintendent to discuss the proposal rejection, nor did they look for workable solutions. As indicated by one team member, "We never did really bring him over here and say why not. . . . When [we] hit the wall . . . we stomped off in frustration." Team members felt the proposal rejection from the district was inconsistent with the Tentative Agreement to promote school-based leadership, and they interpreted this as a message from the superintendent that they did not have decision-making authority.

Episode 2. The concern over the increasing number of students receiving D's and F's and their lack of success at school persisted. With encouragement from the SLT training seminars, the team continued to seek solutions. According to team members, the staff made repeated efforts to communicate with parents during parent-teacher conferences, but they saw no improvement in students' performance. As one teacher indicated, "Nothing is happening and . . . it doesn't seem to be working." As evidenced in the video data during a SLT training seminar, the team discussed the issue and decided that poor grades may be due to students' failure to complete homework. They decided to interview and survey students to try to discover if this was the case.

In the interviews, teachers stated "many of these kids [reported they] were on the D and F lists because they didn't do their homework. . . . There were huge homework lapses from these particular kids." Students indicated that the primary reason why they did not complete their homework was that "no one was home to assist and support them." Based on these findings, the team recommended the homeroom period be shifted to the afternoon so that students could get tutoring assistance from teachers during school hours. Additional tutorial assistance was provided to any student until 4:00 P.M. every day on a voluntary basis. Although all students were welcomed, students on the D and F lists were encouraged to attend the tutorial sessions. By using the homerooms as a tutorial program, the school was not required to get the district's approval, thus overcoming the challenges the team encountered in trying to establish a seventh period.

Scheduling Issues (Episodes 3 and 4)

Episodes 3 and 4 are reflective of scheduling issues that were a major component of the team's work and focus: first, the number of lunch

periods, and second, the school start time. In both episodes, Principal Chris Morris made the final decisions during the summers when most of the teachers were on vacation and unavailable, and team members felt excluded from the decision-making process.

Episode 3. In 1992, with the transition from a junior high to a middle school, the former principal at Paramount structured two lunch periods into the schedule to minimize supervision concerns. Chris Morris preferred one lunch period so that she had more time to talk to all of the teachers and ease scheduling difficulties. She reported, "Every year there was an outcry for communication, that staff could never meet together, even as simple as having lunch together." However, due to the vice principal's insistence, they decided not to change to one lunch period. The team discussed the issue at one of the SLT training seminars when the principal was absent, and they agreed (contrary to the principal's perception) that two lunch periods were beneficial. One member reported, "It used to be a nightmare around the lunch room, and now it's calm and you get your space. . . . If you start talking to people you may find out that some people disagree with [one lunch period]."

In the summer of 1997, the principal hired a new vice principal who was familiar with one lunch period of 700 students. Chris said during an interview, "I was really excited, and I said we've got to do this! This is fantastic—the teachers have wanted one lunch for so long. This is going to go over great!" Chris made the decision to have one lunch period without involving the SLC or teachers in the decision because, according to her, "they were not involved in supervision." In fact, "I think if every teacher would have voted, I mean if they were going to vote, which we usually don't vote, [they would have wanted one lunch period]."

Episode 4. The superintendent said that parents in the community were complaining that all the schools in the district started at the same time. In fact, "We had a number of complaints from parents . . . who had to drop off their kids at three different schools. They all start at 8:00 A.M. . . . so someone is too early and someone is too late." In the spring of 1997, the district agreed to stagger the start time for the following school year, with Paramount to start at 7:45 A.M., fifteen minutes earlier than previous schedules. Team members were concerned for two reasons. First, from their experience, they knew how difficult it was for most of their students to start as early as 8:00 A.M. Second, they were upset that the superintendent did not consult with them as the SLT before making this decision.

During the SLT training seminars, with the focus on research and data collection to make decisions, team members began collecting research on adolescent students that supported what they observed in their school. The research indicated that adolescent students who start their school day later in the morning tend to have better performance than those who start earlier. Based on their findings, team members asked the principal to discuss the time-change issue again with the superintendent. The principal reported that she approached the superintendent, and he said it was impossible to change the schedule for the coming year. SLC members and teachers felt frustrated and complained to the principal for not having the opportunity to influence the district's decision. The principal stated, "There were teachers who just kind of threw up their hands and said is the district listening to us? . . . Why are we doing this work if they are not listening to us?" In addition, the principal and the superintendent also received complaints from several parents who were "just up in arms" about the district's decision to start the school day at 7:45 A.M.

Principal Morris continued discussing the school start-time issue with Superintendent Green during the summer of 1997. In her interview she reported that the current time decision "is really against everything we [the SLC] have been working for. I know it may seem like a minor thing but [it's an indication of how much] the district listens to us, and what we do as professionals." The superintendent decided to have a meeting that summer with district staff, Paramount administrators, and team members and teachers to study the feasibility of changing the start time from 7:45 A.M. to 8:30 A.M. During her interview, Principal Morris stated,

I tried to get a hold of every leadership team member [and] I couldn't get hold of hardly anyone. I had to make the decision and I made it. . . . I couldn't help that it happened during the middle of the summer. I based the decision on things that we had talked about that I felt were important to the whole staff.

According to Superintendent Green, it was decided that a change to 8:30 A.M. would be feasible. Principal Morris was excited about the decision. When the new school year began, however, some team members as well as other teachers were upset over the start-time change. They complained that, again, the principal did not involve them in the decision. As the superintendent noted, "She was [excited] . . . it was just wonderful. Then some of the teachers got all [upset] about that [because] it wasn't [their] decision." Team members and teachers believed there was nothing wrong with the principal's summer decisions; it was the fact that they were not involved in the decision-making process that upset them.

Summary

In the four episodes, the team's interactions and attempts to implement change to improve student learning can be understood as a sequence of events that built into an overall perception of its decision-making capabilities. In the first episode, team members were thwarted in their efforts. In the second episode, with the help of the SLT training, they regrouped and persisted with the issue of concern. Their high sense of efficacy and commitment to the good of the students as revealed in an SLT evaluation survey is an indicator of why they were able to persist. The third episode appeared to have less importance for the team than the episodes that revolved around student learning. It did have an influence on communication difficulties between the teacher team members and the principal, and it represented an instance when the team felt inadequately involved in the decision-making process. In the fourth episode, team members' frustrations were exacerbated by their lack of involvement in the decision, particularly when they had completed research on the issue and their professional judgment was involved.

The following perspectives focus on the superintendent's, principal's, and team members' perceptions about their relationships, roles, and responsibilities.

Perspectives

The Superintendent

Superintendent Norm Green's philosophy of management is to be supportive of principals and to help them meet the needs of their schools. He does not believe in managing schools from his office, but rather allowing principals the autonomy to operate their sites. He used Paramount as an example of his philosophy by saying that the principal "happens to like the CSLA training . . . [and] I don't want to go over there and muck it up, because that's kind of micromanaging the school." He visits a school when "invited to come in and talk about district policy or . . . once or twice a year on a major issue. [Otherwise] I think it is better for me to keep my hands out of it."

In 1995, when Superintendent Green assumed his position, he believed the Tentative Agreement, signed by the former superintendent and the Teachers' Federation, "wasn't really clear [about] how things were supposed to work." It "was interpreted as any decision dealing with personnel, budget, and curriculum" and was open for discussion. According to Green, this lack of clarity in the language of the contract regarding the

decision-making authority of the leadership councils at district schools led to different interpretations. In some schools, the staff attempted to have committees manage areas of routine administrative decision-making procedures such as "what kind of paper to order for the [copy] machine." The superintendent believed this limited the authority of principals to perform their jobs effectively, and principals "felt handcuffed by the [Tentative Agreement]." He also reported that some teachers in the district felt they should not be making decisions about the daily management of schools, and they were "coming to these meetings upset, [saying] why are we wasting our time." Therefore, one of his first goals as superintendent was to clarify the ambiguity through negotiations between the district and the Teachers' Federation.

According to Norm Green, the new contract clarified the responsibilities and authority of teachers and administrators. It defined the concept of shared decision making as "having people who are going to be affected by decisions be involved to the degree that they would like to and the degree that it is helpful in the process." Under this contract, teachers were included in decisions related to educational programs, budget, personnel, and instruction. The ultimate decision, power, and responsibility, however, remained with principals who "cannot relinquish those responsibilities to other individuals or committees." The superintendent felt that establishing clear parameters of decision making was necessary and that the previous contract led to a great deal of frustration and mistrust. He cautioned, "The worst thing to do is [delegate responsibility for] decisions and then after the decision is made say that's not the right decision." He believed it's the principal's responsibility "to define and make it clear what decisions are being made . . . [and] figuring out how you're going to make [a decision], what information you need, and who is going to be involved."

The Principal

Initially, Paramount's principal, Chris Morris, wanted to involve teachers in the decision-making process of the school. She said, "[I wanted] information before I made decisions, you know . . . an advisory kind of situation . . . I believe in that kind of style. I really feel the more teachers and staff members are empowered in decisions, the more you get buy-in." Furthermore, under the former superintendent she was encouraged to involve teachers in a wide range of decisions as part of the "union contract that there will be a leadership council." She created the SLC. Chris stated, "I had this grand vision that teachers and everybody on the team would have an equal weight in their decisions, and I have come to find this is not realistic." Chris learned from Superintendent

Green that her role as principal was to have a district perspective instead of a school perspective and that she would make the "ultimate decisions" for the school. In her interview Chris said, "I was a little bit nervous when that kind of proclamation, if you will, came down, but actually it seemed to be a relief to some of the teachers. . . . [It was] finally clear that when an ultimate decision needs to be made the principal does it." She believed she had "to take the front in decisions," and that Superintendent Green's primary goal "in the last three years has been consistency and the reason is all based on [student performance]."

Chris Morris felt that the teachers were not always familiar with the district's perspective on issues such as scheduling and personnel, and she found herself in the middle of the teachers and the district. She believed that "often-times that has been a problem with the leadership team, it's not like they are anti-district, but maybe [without] a clear understanding." Yet, she believed that the district approved the team's proposal to start the day at a later time because she had considered the district's perspective, and they worked together toward finding a solution. Chris now recognized the challenge to implementing her initial goals for the leadership team in decision making.

School Leadership Team

At the beginning of the Paramount SLT training seminars, the interview and video data suggest confusion and uncertainty among team members regarding their responsibilities as a decision-making team. The team considers lack of communication the primary source of misunderstanding between administrators and themselves, and members hope "to be perceived as a body that will promote communication." Through the training, they hope to gain new insights into their role as leaders in school restructuring, and the importance of "taking the responsibility to be an active participant in [their] work." One team member noted, "I see the development of a strong team as changing who . . . get[s] access to . . . the information by having a larger group of people that make decisions." During the training, the team addressed questions of purpose such as: "What brings [us] together as a team? What is [our] purpose for working together as a team [at the school]?" Another activity provided them with the opportunity to complete a "school systems graph" that encourages team members to look at roles and responsibilities.

During the SLT seminars, teams were provided with process and educational content knowledge, and they gained facilitation, communication, and problem-solving skills. They used their developing skills to research and

identify problems and develop new programs for their school. Similar to other teams that received three years of SLT training, the team reported improvements (significant at the 95% confidence level on a yearly evaluation survey) in their use of data and focus on issues of teaching and learning. The training seminars provided the team with multiple opportunities to engage in a dialogue about significant educational issues away from the pressures of their school in an atmosphere of support and encouragement—conditions of professional development identified by Little (1993) as essential if a school staff is to be able to implement meaningful school reform. This focused time enhanced their skills in identifying problems, collecting data, and using research to propose solutions. Through the training, the team actively defined its role as problem solvers, addressing issues they perceived would enhance student learning. Team members reported that when the superintendent made decisions without consulting them, “a lot of people got really frustrated . . . [and asked], why are we going to all these committee [meetings]?”

Inconsistent and conflicting messages and expectations from the two superintendents and the principal contributed to team members’ confusion about their new role as school leaders. As one member noted, “I think the role of the team right now is vague . . . my attendance at these meetings just confuses me. . . . You go to a meeting and you think that the issue has come to some conclusion when it [hasn’t].” Another team member said, “Maybe things were already decided somewhere else by the time we got there . . . so some people weren’t sure why [we] were there.” Team members believe that at this time it is difficult to say what the actual role of the leadership team is at the school. One team member explained part of the difficulty “seems to be a lot of newness. We have a new super, new budget person, and the principal is new and she is not used to junior high school.”

In the next section, through the multiple lenses of history, episodes, and frameworks, we examine the roles of the principal and the team from an integrated conceptual perspective as a way of looking at the social phenomena of schools.

Integrating Perspectives to Explore Principal-Team Dynamics

Many authors have attempted to describe the inherent complexity of organizations and systems in which individuals participate. These descriptions have tended to present organizations as somewhat static, more or less

impervious to interpersonal relations, and with discreet boundaries between the inside and outside of the organization. These traditional theories of organizations are important for furthering our understanding. Yet, as changes occur in the dynamics of organizations and the roles individuals are expected to play, the patterns of behavior have not always followed the same course. Often individuals within schools continue to perceive the working of schools and the role they are to play in a hierarchical way with top-down decision making and direct instructions from superintendents and principals. With the advent of SBM and SLTs, individuals in schools (e.g., superintendent, principal, teachers, and staff) must readjust their behavior patterns and assumptions of the role they are to play in governing the school. Both SBM and SLTs call for a bottom-up decision-making process that asks teachers, staff, and others to make decisions important for their school.

By integrating perspectives, we see this as a "systemic-structural perspective" (Altrichter & Elliott, 2000), not as "orthodoxy," but in combination with micropolitical analysis (Mawhinney, 1999; Wallace, 2000). For achieving these ends, we draw on concepts from a systems and structural perspective of organizations (Hanna, 1997; Hardy & Clegg, 1996; Scott, 1992; Senge, 1990) and micropolitics (Blase & Anderson, 1995; Mawhinney, 1999; Wallace, 2000). Core concepts from these theories allow us to view the work of the principal and SLT from the macro-organizational level of school structures, environmental influences, and role theory that shape and define the actions of the team. The micro-perspective, which encompasses intergroup factors and micropolitics, helps us to understand the implicit cultural prescriptive that guide participants' actions. Integrating these perspectives offers insights into ways that school leadership teams lead their schools in the reform process because reforms tend to politicize schools and threaten existing roles, relationships, power, and resources. These dynamic relationships are portrayed in Figure 5.1, an Integrated Perspectives Model, which encompasses systems theory (Hanna, 1997; Scott, 1992; Senge, 1990) and a micropolitical perspective (Blase, 1991; Datnow, 1998; Mawhinney, 1999). Systems theory includes three components and indicates the relationships among (1) environmental factors, (2) organizational factors, and (3) intergroup relations.

Environmental factors, by definition, are everything outside the system's boundary. In this study, we perceived demographic changes in the school district as an objective environmental factor influencing and challenging the school and the leadership team to think in new ways about its students and the issues they faced. The SLT training was also viewed as a environmental

Environmental Factors

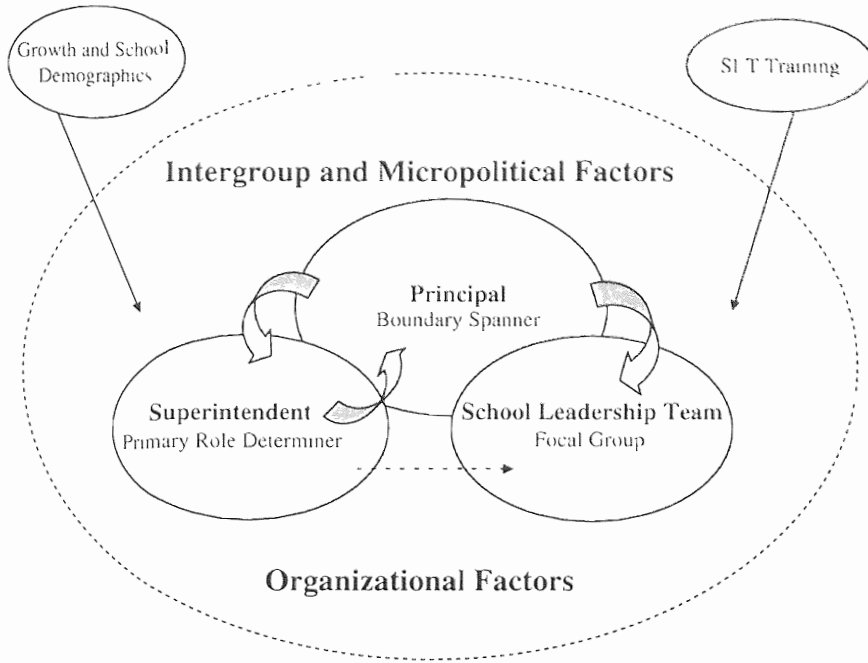


Figure 5.1 An integrative perspective model of environmental, organizational, and micropolitical factors that influence school leadership team decision making, power, and authority.

factor because it provided the team with an expanded perspective of its potential to lead the school and to learn needed knowledge and skills to assume its new role.

Organizational factors include structure, policies and procedures, timeline and deadlines, role requirements of position, purposes and goals, and leadership transitions that influenced the team and the team's functioning. Team members had to further their understanding of the structure of leadership at their school, learn the policies and procedures that would affect what they were able to do and how they could do it, gain new responsibilities, and adopt new roles.

Research using intergroup and interpersonal factors includes elements of climate and structure that surround the focal group (the team) in an organization. For this case, critical intergroup factors are the mode of communication, the frequency of interaction, physical location, feedback, and

participation (Van Sell, Brief, & Schuler, 1981) among the superintendent, the principal, and the school leadership team. We found that infrequent interaction, indirect mode of communication, and perceived negative feedback from the superintendent adversely affected the team and its sense of accomplishment. The focus on the team as a whole is supported by the work of Hackman (1991), who argues "the way a group relates to other groups sometimes [is] more important to its effectiveness than the way members relate to each other" (p. 2).

Systems and Role Theory

Through a systemic perspective incorporated with role theory, we gained insights into the issues faced by the Paramount SLT as they assumed new roles and responsibilities at the school. A common understanding of systems (Hanna, 1997; Scott, 1992) is that there is interdependency between organizations and their environments. An open systems approach seeks to identify components, understand the nature of interaction between them, and examine the influence of the external environment on internal organizational functioning (Hanna, 1997). Although this separation of components is possible in theory, as we see in the Paramount case, the boundaries among components and participants are not so clearly defined in actuality. As Clegg and Hardy (1996) suggest, boundaries break down and issues merge and blur as actions occur in a complex system. In attempting to understand this complexity, role theory can provide insights into existing organizational structures and systems.

Importance of Role Theory in Understanding Organizational Conflicts
Role theory seeks to describe "patterned forms of behavior, social positions, specializations, and divisions of labor" (Thomas & Biddle, 1966, p. 3) as well as the processes by which members communicate, learn, and are socialized. The roles that individuals play include a set of prescriptions that define the behavior of participants within the social system. Furthermore, roles are not limited to "one person's behavior, but must include the behaviors of others which provides the rights enabling those actions" (Lopata, 1995, p. 1). For instance, members of the Paramount team assumed the role of leadership with the definitions of that role as presented by the first Tentative Agreement, the SLT training seminars, and the principal. Each individual team member defined and integrated their role as a teacher, member of the team, and school leader. With changes in superintendents, uncertainty and ambiguity was introduced into the relationships. When roles are in transition or new roles are introduced, individuals'

past behaviors and patterns of interaction may not be appropriate, and new behaviors and patterns need to be learned. This learning occurs through communications and repeated interactions of different members within the system and with outside forces such as the leadership team training (Kahn et al., 1964). As these new roles are being learned, there is a strong likelihood of both role ambiguity and role conflict.

Challenges When Roles Are Ambiguous and Conflictual. Role ambiguity and conflict have been widely researched as a way to understand the stresses associated with membership in organizations (Miles & Perreault, 1976; Netemeyer, Johnston, & Burton, 1990; Van Sell, Brief, & Schuler, 1981). Role ambiguity and role conflict "have been established in organizational literature as important, influential factors in the work setting" (Olk & Friedlander, 1992, p. 389). Role ambiguity is defined as "a lack of clarity regarding the expectations for one's role, the methods for fulfilling those expectations, and the consequences for effective or ineffective performance" (Olk & Friedlander, 1992, p. 390). Although the sources of role ambiguity vary, they can occur out of three general conditions: "organizational complexity, rapid organizational change, and managerial philosophies" (Kahn et al., 1964, p. 75). Individuals at Paramount Middle School were confronted with multiple aspects of ambiguous and new circumstances that demanded a change in their roles and behaviors. They worked to redefine the way the school functions with a leadership team; however, their attempts were in direct opposition to the hierarchical nature of the district.

Role conflict typically "arises when a person is faced with expectations requiring behaviors that are mutually competing or opposing" (Olk & Friedlander, 1992, p. 389). Van Sell and colleagues (1981) indicate that some consequences of role conflict are unsatisfactory work group relationships, inadequate perceived leader behavior, and unfavorable attitudes (p. 49) toward those in positions of power and who are initiating new roles. In organizations, this person generally plays a central role in intergroup relations as a "boundary spanner," someone who helps facilitate communication between groups (Friedman & Podolny, 1992). As can be seen in Figure 5.1, the principal was in the role of boundary spanner and was most likely to encounter role conflict as a result of membership in multiple groups (Van Sell et al., 1981).

Types of Role Conflict. Five major types of role conflict are relevant to this study (Kahn et al., 1964; Miles & Perreault, 1976; Van Sell et al., 1981): (1) *intrasender conflict*: the extent to which two or more role expectations from a single role sender are mutually incompatible (e.g., the superintendent's

understanding of the principal's role as one of management, in contrast to her belief in shared decision making as a responsibility of all members at the school); (2) *intersender conflict*: the extent to which two or more role expectations from one role sender oppose those from one or more other role senders (e.g., the superintendent and leadership team both communicated opposing expectations to the principal); (3) *interrole conflict*: pressures associated with membership in one organization that are in conflict with membership in other groups (e.g., the principal experienced conflict in her role on the SLT and in her role as principal as defined by the superintendent; these roles had opposing perspectives and associated behaviors); (4) *person-role conflict*: the extent to which role expectations are incongruent with the orientations or values of the role occupant (e.g., the principal whose value orientation supported shared decision making, but whose formal role was defined as authoritarian); (5) *overload*: the extent to which the various role expectations exceed the amount of time and resources available for them to be fulfilled (e.g., as exhibited by the principal and the team members regarding the time frame for their decisions).

Useful for understanding the Paramount case is the Kahn and colleagues' (1964) role theory model that depicts the interpersonal process between the person being sent role expectations and those sending the expectations. (See also Van Sell et al., 1981.) The district superintendent plays the most important role in defining the team's role and sets expectations for the team. According to this model, the principal is an important boundary spanner receiving messages from the superintendent and communicating them to the team.

Micropolitical Perspectives

Micropolitical perspectives of organizations offer the potential for insights into the relational and power issues faced by school leadership teams as they assume new roles and responsibilities and negotiate their place in the system. According to Blase (1991), "Micropolitics refers to the use of formal and informal power by individuals and groups to achieve their goals in organizations" (p. 357). This perspective emphasizes that "school reform is rarely a politically neutral event . . . teachers often have one overriding concern—the preservation of a stable sense of personal and professional identities" (Datnow, 1998, p. 21). Unlike organizations in which environmental and external forces may be reduced by strategies designed to minimize influence, schools are more open to relational factors from multiple constituents who have the ability to influence or change them. Micropolitics turns our attention to the sources and use of power "to determine which

issues and questions are seen as relevant and critical and which will be viewed as irrelevant and illogical" (Mawhinney, 1999, p. 164).

In this study, two sources of power are particularly significant. (1) power derived from legitimate authority to make decisions as a leadership team, and (2) power acquired through expert knowledge gained through the SLT seminars. The political dynamics of team members encompasses the actions of the team, the norm of equitable relationship among colleagues, as well as the interactions of the team within the hierarchical district structure. Thus, a micropolitical perspective can help to investigate how power is used by the team in conflictual situations as well as how power is used to "build support to achieve their ends" (Mawhinney, 1999, p. 168).

In a study of teacher leadership roles, Hart (1994) found that "during periods of change, roles and social systems may exert a powerful influence, particularly as coalitions are being formed and a new interpretation of reality is emerging" (p. 494). As Paramount developed new role configurations as a leadership team for decision making, adjustments in behavior and expectations affected organizational functioning. As the team engaged in leadership training, new perceptions and interpretations of their role at the school emerged, contributing to frustration and even conflict. Thus, attempts to make structural changes—such as implementing a new school leadership team, reconfiguring an organization, and shifting role relationships—need to be viewed as significant undertakings and as political events.

What We Learned From an Integrated Perspective

By adopting the lens of an Integrative Perspective Model (Figure 5.1), we identify critical factors contributing to role ambiguity and role conflict for Paramount's principal and leadership team. Through a historical perspective of environmental and organizational factors, we surfaced conditions contributing to role ambiguity and role conflict and identified key micropolitical dynamics. The analysis of intertextual relationships among written policies, interviews, and SLT training seminars created a basis for assessing the congruence among texts and examining how the team recognized, acknowledged, and found the texts socially significant (Bloome & Egan-Robertson, 1993; Chrispeels, 1997). As Bloome and Egan-Robertson (1993) argue, "intertextuality is socially constructed by members of a group and thus involves more than juxtaposition of texts by a researcher" (p. 332). By examining a series of episodes, we explored how elements of intertextuality as understood by the team and principal defined their role *vis-a-vis* the district policies and the SLT training. The model helps to

highlight the complex and embedded nature of school systems that must continually respond to environmental pressures

This chapter illustrates the ways role theory provided insights into the frustrations experienced by the principal and team as they attempted to carry out their work. Role theory drew attention to the critical role of the principal as a boundary spanner in sending, receiving, and responding to messages. Use of the Episode Model with organizational history and individual perspectives was useful in examining the work of the team over time as it struggled to implement shared decision making. A chain of episodes illustrated and documented the development of patterned responses. They portrayed participants' perceptions, future interactions, and their sense of power, control, and relationships to others in the organization. However, the episodes took on their full meaning only when they were placed in the larger historical context. In addition, our analysis suggests the value of combining multiple perspectives and frameworks to analyze complex phenomena. Systems theory, with its greater attention to organizational and environmental factors, contributed to our understanding of why there was evidence of role conflict and role ambiguity. Examining organizational factors highlighted the clash between a new order of teacher empowerment and the "old order" (Chion-Kenney & Hymes, 1994) of hierarchical decision-making structures and thinking. This district operated with the best of intentions to empower teachers and gave them greater say in a wide range of decision-making areas. It is not enough, however, to implement shared decision making at the site without taking into account its consequences and implications for other levels of the organization. Combining systems theory with event mapping helped to illuminate the turbulent environment over time and provided "a longitudinal examination of *historical contexts for interpreting the actions* and responses of particular groups" (Chrispeels, 1997, p. 457). In essence, event mapping made visible the historical context and political variables that contributed to role conflict and ambiguity.

Implications For School Leadership

A number of implications for policymakers and practitioners who are implementing site-based management and establishing school leadership teams emerge from this study. First, systems thinking is critical when implementing a major innovation such as site-based management. Schools are complex systems that need to encompass environmental, organizational, and intergroup factors, and teachers cannot be empowered without concomitant changes in the district administration. Relationships with the

district are a key factor in a team's ability to assume new responsibilities, implement change, and successfully accomplish goals (Chrispeels, 1996; Senge, 1990). The superintendent negotiated, with the teachers' union, language to clarify the concepts of teacher empowerment and roles and responsibilities of leadership teams. He did not, however, examine other aspects of the system, such as training, relationships with principals, and interaction with the team. Without knowledge of the training and direct dialogue with the leadership team, the superintendent was not able to facilitate and support the work of the team. This lack of interaction and understanding helped the superintendent to maintain the traditional hierarchical model, and at the same time, stymied his efforts to promote shared decision making. His management style empowered the principal but undermined her efforts to empower the leadership team, leading to role conflict for the principal and role ambiguity for the team.

Second, enacting a policy to empower teachers and include them in decision making does not predetermine how teachers will interpret and take up the new roles. This chapter indicates the need for specificity and clarity in defining how and in what ways teachers and others are to be involved in decision making. Furthermore, the experiences of Paramount's team suggest negotiations must be ongoing as district administrators, principals, and team members gain confidence and knowledge in how to lead. It also confirms the value of training for enabling team members to suggest innovations for their school, use research to guide their decisions, and pursue solutions. However, the district and leadership team were unable to capitalize fully on these new abilities and help the district accomplish its mission of improved student learning. This finding implies the need for the district and team to coordinate and integrate the training to meet district and site goals.

Finally, relationships, roles, and responsibilities need to be specific and coupled with opportunities for ongoing negotiation and refinement to overcome inconsistencies between beliefs and practices in ways that can impact student learning. Relationships with the district remained a key factor in the team's ability to assume new responsibilities, to implement change, and to successfully accomplish goals for the school. Paramount's S.I.T., after three years of training, was poised to address important issues of teaching and learning. Yet neither the team nor the superintendent, with all communications being filtered through the principal, were able to sufficiently align policies and practices and give the team a sense of accomplishment and effectiveness. This points to the need for congruence between policy and practice when implementing structural changes or shared decision making (Chrispeels, 1996, 1997; Fuhrman, 1993). In conclusion, the good intentions

of the superintendent, principal, and school leadership team were not sufficient to overcome the incongruence between beliefs and practices. This minimized the school's and the district's ability to capitalize on the SLT training so as to enhance the team's ability to lead its school in the process of reform in ways that could dramatically impact student learning.

Notes

1. Research presented in this article was supported by a grant from the Spencer T and Ann W Olin Foundation. A portion of this paper was presented at the 1998 annual meeting of the American Educational Research Association, San Diego, California.

2. This chapter is a revised version of an article originally published in the *Journal of School Leadership*, Vol 9, September 1999, entitled "Role Conflict and Role Ambiguity: The Challenges of Team Leadership at a Middle School." Permission to reprint obtained October 28, 2002, Rowman & Littlefield Publishers.

3. Pseudonyms are used for the school and all participants in this study. The authors would like to thank the superintendent, the principal, and the School Leadership Council and School Leadership Team members who allowed us to follow their work. We hope that the ideas presented assist them and others in the challenging tasks they are undertaking to improve their schools. The authors also wish to thank Itamar Harari, Cheryl C. Strait, and Marisol A. Rodarte who provided research assistance useful in clarifying issues and ideas for this chapter and the original article in the *Journal of School Leadership*.

4. See Bloome & Egan-Robertson, 1993, p. 311, and Chrispeels, 1997, for a detailed description of this method of intertextual analysis and of historical analysis. The concepts from systems theory (Hatch, 1997; Scott, 1992), role theory (Kahn et al., 1964; Van Sell et al., 1981), and intertextual analysis (Bloome & Egan-Robertson, 1993) provided a framework for reanalyzing and interpreting the data presented in the research.

5. For more detailed information on conflict and ambiguity arising from norm conflict, see Bertrand, 1972; for typical antecedents leading to role conflict and role ambiguity, see Kahn et al., 1964; and Van Sell et al., 1981.

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