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SOCIETY FOR SCIENCE  
AND EDUCATION

## **Sociological Perspectives For The Study And Analysis Of Educational Organizations**

**Rosenilde Nogueira Paniago**

Instituto Federal de Educação,  
Ciência e Tecnologia Goiano, Rio Verde, Brasil.

**Patrícia Gouvêa Nunes**

Instituto Federal de Educação,  
Ciência e Tecnologia Goiano, Rio Verde, Brasil.

**Renata Silva Pamplona**

Instituto Federal De Educação, Ciência E Tecnologia Goiano  
Campus Rio Verde, Brasil

**Teresa Sarmiento**

Instituto de Educação da  
Universidade do Minho, Portugal

**Simone de Sousa Moraes**

Escola Municipal de Ensino Fundamental,  
Professora Selva Campos Monteiro, Rio Verde Brasil.

### **ABSTRACT**

**In this text we present a discussion on some theoretical models that support the study of educational organizations, focusing on bureaucratic and anarchic models in an integrative perspective, dual, supported by the diptych mode of operation proposed by Lima [9],[10]. The study aims to present sociological perspectives for the understanding and interpretation of educational organizations focusing on bureaucratic and anarchic models. It is, therefore, a theoretical essay of qualitative approach, based on bibliographical research as the theoretical support.**

### **INTRODUCTION**

In this article we present sociological perspectives for the study of educational organizations, signaling some of the main paradigms and theoretical models that support research on educational organizations. The objective was to present some of the possibilities of bureaucratic and anarchic models for the understanding and interpretation of educational organizations.

The construction of this theoretical essay was anchored in our experience as teachers of Basic Education and the training of teachers in Higher Education Institutions, as researchers and especially the participation in research and formative experience in the Institute of Education of the

University of Minho, during the doctorate and post-doctorate in which, in light of the theoretical-conceptual references studied in curricular units, which dealt with the Sociology of Education and the Organization of Educational Institutions, taught by teachers with renowned production in this theoretical field, such as Professor Lícínio Lima, we were able to discuss theoretical and practical elements on the models of an interpretative analytical nature, which focus beyond the official, formal, structures, the actions that actually occur in school educational organizations. Among the factors that justify the use of the models of analysis of educational organizations, we can argue that pedagogical practices, the diverse heterogeneous relationships that materialize in the daily life of educational institutions, are indispensable elements for the understanding of the formative process that materializes in there.

Educational institutions are complex, historical, dynamic and constantly moving contexts; therefore, even if the guidelines prescribed in official documents are homogeneous for all schools, even if it is possible to identify socio-cultural characteristics in different schools, there are elements that are unique in the school context, which are the hidden structures [18] of educational organizations, resulting from the set of relationships of the specific group of people in these institutions.

In light of the above, the present text is a theoretical essay, so we have already stated that we are aware of the limitation of this production, given the various possibilities of analysis models of organizations. Therefore, even at the risk of a piecemeal apprehension of these conceptual-theoretical references, we will focus especially on the bureaucratic and anarchic models from a dual integrative perspective, sustained by the diptych mode of operation proposed by Lima [9], in which the author configures a theoretical framework of the models in two distinct poles: 1) on the one hand, the rational-bureaucratic and social system perspectives that group other models, which emphasize the objectives, planning, connection, conjunction, and order of educational organizations; 2) on the other hand, there are the perspectives of organized anarchy, ambiguity, and the political model that attract other models, and focus on the uncertainties, conflicts, cultural aspects, and subjectivity of the actors of educational organizations. We will also add the importance of a dialogical perspective in interdisciplinary and transdisciplinary postures for the understanding of the various nuances that involve educational institutions.

The study was fundamentally based in Lima [9], [11], adding theorists Bush [1], Morgan [13], Ellström [5], Silva [17], Torres [18], Cohen, March & Olsen [2], Moraes [12], Nicolescu [14], D'Ambrósio [4] and also including us, Paniago and Sarmento T. [15]. We have chosen to present the text outlined in two topics: the educational organization as an object of sociological study; the diptychical way of functioning of educational organizations: face A - school as organized anarchy and face B - school in the bureaucratic perspective.

### **THE EDUCATIONAL ORGANIZATION AS AN OBJECT OF SOCIOLOGICAL STUDY**

The educational organizations as object of sociological study have, according to Lima [9], revealed themselves to be a fertile field of studies. The educational organizations as object of sociological study have, according to Lima [9], revealed themselves to be a fertile field of studies. A fragmented view of school reality does not make it possible to capture the educational phenomena in their totality. However, no matter how much we use various lenses, models of analysis, it will not be

possible to apprehend everything that actually happens, considering that the school educational process is dynamic and is in permanent movement and (re)construction.

In addition, it is important to point out that there is no scientific truth, as Fourez [7] states, since scientific reasoning is linked to human histories. Scientists are not alone in observing an object, but they are soaked in its culture and by a type of language linked to socio-historical and cultural contexts, a fact that implies recognizing that scientific knowledge is relative and contextual, therefore, it is a human construct.

From the point of view of the analysis of educational organizations there are various theoretical perspectives, ranging from reductive, fragmented to more complex, analytical perspectives, which consider organizations in a more holistic way, and emphasize the dynamics in action of the school organization, not merely the official proposals proposed for the organizations.

In this section of the discussion on educational organizations as an object of sociological study, we will also add the importance of interdisciplinary and transdisciplinary dialogue. In this sense, the transdisciplinary approach is a possibility that can contribute to this new type of looking and way of getting to know educational organizations, since "the transdisciplinary point of view allows us to consider a multidimensional reality, structured in many levels, replacing the reality of classical thought of a single, unidimensional level". [14]. Discussion also woven by us [15].

Among the theorists who defend school research in this perspective, we mention Moraes [12], Nicolescu [14] and D'Ambrosio [4] when they point out the importance of a new approach in education and, in the way of knowing aspects related to school, that considers all the dimensions of the human being, that restores the link between nature and other subjects. A knowledge that enables the understanding of the complexity of life, the interdependence between the members that make up the triangle of life, composed of: individual, society and nature [4]. We have also stated that "The complexity of the phenomena involves the object and its different interactions at different levels. The transdisciplinary approach seeks to understand the dynamics established between the object at the interface with reality, with its heterogeneous and complex relationships.[15].

"Trans" means what lies between, through the disciplines and beyond any discipline. Transdisciplinary studies and research complement disciplinary research, since while disciplinary research focuses on a single level of reality, transdisciplinarity goes beyond, by focusing on the inter-relationships of the movement generated by different levels of reality. In this sense, transdisciplinarity is based on three axes: the levels of reality, the logic of the third included and complexity, pillars that guide the methodology of transdisciplinary research.[14].

In this line of understanding, transdisciplinarity transcends the restricted field of application of classical science, considering that:

*Disciplinary research concerns, at most, a single and same level of reality; indeed, in most cases, it concerns only fragments of a single and same level of reality. On the other hand, transdisciplinarity is interested in the dynamics generated by the action of several levels of reality at the same time [14, p. 15].*

By assuming a transdisciplinary posture, the researcher will break through, advance the epistemological boundaries of disciplinary science, develop the feeling of tolerance, affection, openness to understand the differences in daily school life, which to be explained and understood, needs to be contextualized and recognized in the different human relations, social, beliefs, myths, culture of different people who interrelate.

Thus, in transdisciplinary research in education, several methodological approaches are contemplated that do not dispense art, imagination and corporeality, as constituent elements, for the exchange of knowledge inherent to the work of the scholar, the creative and the transdisciplinary researcher. These complex realities do not dispense the senses, affections and sensibilities, which have in art, in spirituality, the food for the body, for life, to say it and to reveal it. Thus is transdisciplinary research, which considers the triad in the movement of the triangle, is spiral; without passing on, with sharing. It occurs in a context of life, without conclusion, always with new questions, in acting, in sounds, in colors and bodies in various movements of presence. [15,p.14-15].

In turn, Morgan [13] highlights the importance of the researcher being open and flexible to the observed object, reaching evidence only after a broad understanding of the emerging situation in the act of observation. The skills and abilities to interpret situations are developed in an intuitive way, consisting of experience and well-founded theoretical-conceptual references. The theory is essential to interpret reality, to take advantage of divergent perspectives to broaden our gaze and to use metaphors as a way to interpret reality. According to Morgan

*"The metaphor gives us the opportunity to broaden our thinking and deepen our understanding, allowing us to see things in new ways and act in new ways. [13]."*

In this way, by making use of the representative images of the school education organization, we will be able to grasp complex, multifaceted aspects that are not revealed by means of disciplinary studies. This is what Morgan [13] emphasizes, by highlighting the use of metaphors as a way to help our gaze, our ability to read, interpret and understand the complex reality of organizations.

In a discussion about school as a category in education research discusses various perspectives of school analysis and the micro and macro perspectives of the school approach, stating that

*"For all the reasons set out above, it is understood that a complex and multifaceted object of study, such as school, congruently requires a plural and multi-focused theoretical approach, whether in terms of analytical approach and scale of observation, or in terms of theoretically sustained interpretation." [...] [10]."*

To this end, the author points out a significant model of the functioning of educational organizations: the diptych mode, which will be presented below.

### **THE DIPTYCHICAL WAY EDUCATIONAL ORGANIZATIONS OPERATE**

Knowing the impossibility of educational organizations to fit into this or that model of analysis, as it has already been explained, and the complexity of using various models of analysis, in this study we have chosen to highlight the bureaucratic and anarchic in an integrative, dual perspective, sustained by the diptych mode of operation of the school as an organization proposed by Lima [9]. The coexistence of several models is defended by Lima [11] when he states that

*"the use of the plurality of theoretical models of analysis of organizations becomes essential for a critical understanding of the school as an educational organization and its process of institutionalization, inscribed in the long term".*

Bush [1] is another author who, when talking about the theories of educational administration, states that, for the most part, they emphasize some aspects at the expense of others. As schools and universities are too complex organizations, favoring one model is neglecting other possibilities.

However, the use of various models for the analysis of educational organizations is a complex and arduous task, which requires a great effort from the researcher and a deep theoretical-conceptual basis, so as not to take the risk of making superficial and fragmented analyses. Knowing the risk, we decided to signal the proposal made by Lima [9] about the diptych model for the analysis of educational organizations, which is configured from bureaucratic and anarchic perspectives, dichotomous models, which are based on other analysis models. As Lima states

*"The school will not be exclusively bureaucratic or anarchic. But not being exclusively one or the other, it could be both at the same time. To this phenomenon I will call the diptych mode of operation of the school as an organization". [9].*

Thus, Lima [9] does not rule out the analysis models, focusing on this or that, on the contrary, they add up and are complementary in the analysis of educational organizations:

*[...] On the one hand, interpretations of the rational-bureaucratic type and of the social system, attracting other models of analysis that emphasize more the clarity of organizational objectives, the processes of forecasting and planning, the strategies of the rational type, the order and the connection/conjunction of elements within organizations. On the other hand, models of political analysis, organizations, models of ambiguity and organized anarchy, among other metaphors, constitute another pole of attraction; namely attracting paradigms of a cultural and subjective type, highlighting more the subjectivity, the uncertainty of technologies and the lack of clarity and consensus of objectives, the cultural and symbolic dimensions of organizations.*

Therefore, these dichotomous configuration models make it possible to visualize schools in two faces, the bureaucratic face and the anarchic face, so that on each face, other models and metaphors representative of educational organizations are grouped.

When speaking about his model for the study of educational organizations, Lima [9] refers to the model proposed by Erik Ellstrom, making it clear that he is influenced by it, however, he concentrates on rational and anarchic models, because they are

*"[...] more congruent models, being situated, according to the variables considered for their construction, in two different poles, if not extreme. For this reason too, they have exerted a certain force of attraction on the other models [...] [9]. In addition to this, Lima, speaking of the bureaucratic and anarchic models, justifies his choice " [...] by the fact that the central question of rationality and decision-making is considered by the two to be of equal importance, although characterized in a distinct and even antagonistic way (Ibid., p.21).*

Ellström [5] presents an interesting way to analyze educational organizations. In speaking of the various models of analysis of the educational organization, he warns that each model focuses on

different aspects in the organizations, thus resulting in fragmented interpretations. It then proposes a multiple perspective of analysis, integrating and articulating, grouping the rational and social models in the identification of IS-Model (Interventionist Social Model) and the political and analytical models in IP Model (Interactive Political Model). These models make it possible to detect the various faces of the educational organization. [5].

From the above, we will discuss from the perspective of Lima [9], [10], the two faces of the diptych model: Face B, represented by the school as organized anarchy, and Face A, represented by the bureaucratic-rational model.

### **The educational organization as organized anarchy: The face A of the diptych model**

The school as organized anarchy represents the face A of the diptych model proposed by Lima [9]. On this face, the school is represented, among others, by the perspectives of ambiguity, political, cultural and subjective arena. These are tendencies that contradict, break with rational models, that focus on the formal side, norms and do not consider the complexity of educational organizations, the subjectivity of the actors who are part of these organizations.

Lima [9], states that "the model of organized anarchy challenges the well-established model of rational bureaucracy, not by seeking to superimpose itself on it, but by seeking to compete with it in the analysis of certain phenomena and certain components of organizations [...]". As can be seen, the anarchic model will make visible to the researcher elements that are not visible from the point of view of bureaucratic models. According to Lima [9], anarchy does not translate into disorganization, but represents another type of organization.

The political perspective of analysis of educational organizations, focuses on aspects related to conflicts, diversity of interests and inconsistency of objectives, i.e., the political process of the organization is prioritized. For Bush [1], in political models, organizations are arenas, where decisions are negotiated and conflict and power underlie this model, it is something normal, resulting from differences of ideas.

Political models assume that in organizations policy and decisions emerge through a process of negotiation and bargaining. Interest groups develop and form alliances in pursuit of particular policy objectives. Conflict is viewed as a natural phenomenon and power accrues to dominant coalitions rather than being the preserve of formal leaders. [1].

Therefore, the analysis of educational organizations consolidated in this perspective will evidence the negotiations, the conflicts, the strategies for the maintenance of power and the strategies of the actors to break with the power structures in force. School actors, therefore, are not homogeneous groups that share the same ideals; they are heterogeneous groups, with convergent and divergent ideas that can interfere in the structure of educational organizations

From the point of view of the analysis of educational organization, considering the cultural perspective, culture and the way it influences the dynamics of school organization are highlighted, because, according to Torres [18], it is a social and organizational process built through dialectic interaction. For the author, the school organizational culture is not a direct reflection of the organizations' structures or simply the result of human actions; on the contrary, its construction

process is based on diverse and complex relationships between the structure and the organizational action. In other words, the educational actors, while being conditioned and dependent on the structures, will imply in a new sense and provoke changes in these structures from their actions and mobilizations. And, finally, the perspective of ambiguity is, according to Lima [9], another of the images of organized anarchy, and is even used through other metaphors, such as the Garbage Can model in the perspective of Cohen, March & Olsen [3] in which the garbage can is.

*To understand processes within organizations, one can view a choice opportunity as a garbage can into which various kinds of problems and solutions are dumped by participants as they are generated. The mix of garbage in a single can depends on the mix of cans available, on the labels attached to the alternative cans, on what garbage is currently being produced, and on the speed with which garbage is collected and removed from the scene. [3].*

For Bush [1], from the perspective of ambiguity, models are configured that focus on instability, unpredictability, uncertainty. In this perspective, the objectives of the organizations are uncertain and participation in policy making is fluid, with the members deciding whether or not to participate, a fact embodied in Bush's speech, "Ambiguity models assume that turbulence and unpredictability are dominant features of organizations. There is no clarity over the objectives of institutions and their processes are not properly understood. Participation in policy making is fluid as members opt in or out of decision opportunities." [1].

### **The educational organization from a bureaucratic perspective: the B face of the diptych model**

In the diptych model proposed by Lima [9], from the bureaucratic perspective or face B, rational and bureaucratic models are configured, with other models being grouped together, represented by metaphors such as: social system, mechanistic, organism, models that focus on aspects of organizational structures, hierarchical structures, definition of objectives and metaphors of organizations. According to Morgan [13] the aspects focused on this model, compare organizations as: systems, machines, organisms, brains, systems.

In this regard, it is worth emphasizing that, according to Lima [9], although the rational model does not only permeate the bureaucratic perspective, he prefers to call it the bureaucratic model. Thus, we will not stick to the description and analysis of all these metaphors, although considering their importance, we will present in this theoretical study only a comprehensive analysis of the bureaucratic and rational perspective.

The bureaucratic model arising from Weber's ideology is based on the idea that the bureaucracy of organizations is an effective management mechanism. According to Weber [21]: "Bureaucratic administration, means, fundamentally, the exercise of knowledge-based domination. That is the trait that makes it specifically rational". For the author the bureaucracy in the organization is translated by precision, clarity, efficiency, regularity, refinement, speed, division of tasks, well defined rules, hierarchical structure of functions.

Therefore, bureaucracy, as a theoretical model, is based on the logic of organization as an institution that aims at efficiency, the refinement of the process, making use of a hierarchical structure of authority, division, the existence of rules, specialization of work, professionalism and impersonality

in relationships, are elements of the ideal type of bureaucracy presented by Weber [19], [21]. Emphasizing that the author translates the ideal type by the way bureaucracy is employed in the organization, that is, its bureaucratic dimensions and not in the perspective of the ideal type to be wanted or desired. In contrast, Weber criticizes the bureaucratic prospects of the school organization.

For Bush, these elements are part of educational organizations, although they are more visible than others, in general, all organizations reveal bureaucratic aspects [1]. Although not identical, the models configured from the perspective of bureaucracy are defined by Bush:

*"Formal models assume that organizations are hierarchical systems in which managers use rational means to pursue agreed goals. Heads possess authority legitimised by their formal positions within the organization and are accountable to sponsoring bodies for the activities of their institutions." [1].*

In this way, we cannot fail to recognize that bureaucracy is a fundamental model to support the analysis of educational organization, however, it is important to emphasize that emblematic issues involve it, since, despite the possibilities of analysis of educational organization, the bureaucratic-rational perspective will only focus on a few aspects. In this sense, Lima [9] states that:

*"The bureaucratic model, when applied to the study of schools, emphasizes the importance of abstract norms and formal structures, the processes of planning and decision making, the consistency of objectives and technologies, stability, consensus and the predictive character of actions".*

As can be seen, studies of educational organization from the perspective of the models configured on Face B will privilege aspects linked to bureaucratic organization, established norms, objectivity, established planning, and the subjectivity and culture of the actors who are protagonists of the school organization's actions is not valued, which justifies the need to use other models of analysis in order to complement the bureaucratic model.

## **CONCLUSION**

The realization of this essay was significant for a theoretical-conceptual deepening about the theories and models that underlie the study and analysis of educational organizations. We recognize that the reflections made in this text are superficial in view of the complexity of this theoretical field, however, we point out some aspects that will stimulate future reflections.

Without pointing to this or that model and without prescribing norms, we could perceive that in the context of educational organizations, the various models of analysis are complementary and important to broaden the lens of the researcher's eye on the practices that materialize in these institutions, resulting from the complex and heterogeneous relationships established by the various actors that coexist in them.

From this perspective, it is important to understand the limitations and possibilities in the use of each theoretical model, not being, therefore, an epistemological or conceptual-theoretical weakness, but the perception that the various paradigms, theoretical models, will consist of a lens for a deeper and broader look at the heuristic process of the study of educational organizations. The



various models, instead of excluding, contribute to the magnification of the vision about the school organization, are lenses that allow to see the reality in several aspects and multifactes. These are different ways of perceiving an object.

The diptych mode of operation proposed by Lima [9], sustained by anarchic and bureaucratic perspectives, are significant contributions to the understanding and interpretation of educational organizations, however, in itself, it is not sufficient for the study of the various multifaceted aspects of educational organizations, which implies also making use of other possibilities, such as the transdisciplinary posture, since it does not include rigid methods. On the contrary, it makes use of the intuition, the sensitivity of looking and listening of the researcher " [...] breaks with the epistemological frontiers of disciplinary science; it amplifies the feeling of affection, of openness to understand the differences in everyday school life, which to be explained and understood, needs to be contextualized and recognized in the different human relationships, social, beliefs, myths and culture of the different people who interrelate" [15].

In general, regardless of the model to be used for the study of educational organizations, it is fundamental to perceive that the different actors who act or protagonize in this space, at the same time as they are influenced by the various external regulations arising from educational policies, have history, life, autonomy and also influence and modify the rules.

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