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Managing change in schools: a review of the Western Australian project

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MANAGING CHANGE IN SCHOOLS:
a review of the
WESTERN AUSTRALIAN PROJECT

by

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International Institute for Policy and Administrative
Studies

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CHAPTER ONE: INTRODUCTION

The Project: Context, Purpose, Strategy

In 1987, the Ministry of Education released a report entitled 'Better Schools in Western Australia: A Program for Improvement'.¹ It outlined radical proposals to make schools more self-determining and accountable. Although much of the program has yet to be put into effect, the plan and steps taken to implement it caused a major upheaval not only to the system but also to people working in it. For example: the managers of change invested a huge amount of work and worry in the whole process; some of the 'victims' of change suffered personally and professionally; and a lot of those in between were left wondering about the educational value of the reform program and its viability in terms of the additional workload involved.

To make matters worse, throughout 1987, restructuring seemed to make no difference to the way schools operated. Instead of grabbing hold of devolution and running with it, most schools carried on much as before, particularly at the classroom level where, for teachers, it was business as usual.

There was a certain irony in all of this. For decades, teachers had criticised the centralised state Education Department for being paternalistic, inflexible and authoritarian. They wanted greater professional autonomy, less regimentation, and a more responsive

¹ Commonly known in Western Australia as the Better Schools Report and Better Schools.

bureaucracy in Central Office. Yet, when the Better Schools Report offered them increased control over resources, staffing and the educational direction of their schools, it was not enthusiastically welcomed as might have been expected. Quite the contrary. Many school staff treated the proposed reforms with cynicism, antagonism and resistance. Their response seemed to be a classic case of, "the cage door was left open but few tried to escape."

If allowed to prevail, those circumstances could have reinforced a perception that the upheaval was all for nothing and that restructuring was incapable of delivering the benefits promised in the Better Schools Report.

Towards the end of 1987 the Central Office of the Ministry of Education set up a project called Managing Change in Schools to find out what the hold-up was. Its stated purpose was to address the following question.

"What changes need to be made to the rules (both explicit and implicit) which govern the operation of schools to enable them to become self-determining?"

Five senior high schools (Years 8-12), one district high (K-10) and one primary school took part in the project. As a first step some of the schools began a functional review of their own institutions based on the principles of corporate planning, and from the review produced an embryonic development plan. An external management consultant from interstate facilitated the process by conducting a two day workshop in over half of the schools. Throughout the two days, participants discussed matters such as: What is the school here for? What tasks should it undertake to achieve its purpose? What kind of structure will help it get those things done? In the process of tackling those questions, they challenged established centre/district/school relationships and questioned traditional assumptions about how schools achieve their goals. They also

looked at where decisions are made, who should be responsible for what, and how schools can be fundamentally re-designed.

The next step was to stand back and allow the seven schools to develop proposals for change in areas of priority for them. They were told not to feel limited by existing rules because, where possible, regulations would be waived to enable experimentation to proceed. Central Office stressed, however, that all proposals had to be within acceptable workload limits for school staff and could not involve additional ongoing funding; that is, all proposals had to be developed on the basis of redistributing current levels of resource allocation, not expanding them. Throughout this stage, the seven schools were given teacher relief time to conduct planning meetings, they had access to a project consultant from Central Office who operated in response mode, and they were invited to present their proposals to Central Office - particularly those which challenged the 'rules'.

Half way through 1989, a little more than a year after it started, the project was suspended; an industrial dispute between the Ministry and the Teachers Union had resulted in a moratorium on all activities linked with restructuring. However, by then the seven schools had presented many of their proposals to Central Office and had begun implementing changes for which they did not need outside approval.

The Review of the Project: Context, Purpose, Approach

Although the project is now finished, many of the issues it addressed remain on state and national agendas. Within the context of its time, and in its own way, the project dealt with matters now covered under award restructuring, enterprise bargaining, and other strategies to increase the productivity of schools.

This review of the project focuses on the barriers which confronted the participants when they challenged the rules. By doing so, it attempts to give a clearer picture of what can be achieved when schools and Central Office try to put devolution into practice. The review is not an evaluation: it does not seek to assess whether the project succeeded or failed in achieving its objectives. An appendix at the end of the report, however, does document the type of things that schools got out of the project. Also, only one extended account of the project existed prior to this review; it was described by some school principals as particularly perceptive and for that reason has been included as Appendix One.

Information for the study was collected from records kept in Central Office and from interviews with representatives of the various stakeholding groups. An early draft of the findings was circulated to people who were interviewed, namely three Central Office staff, three members of the 1988-9 Teachers Union Executive, and the principals of the seven project schools.² Their responses have been incorporated in the text of this report, or as footnotes.

Throughout the report, the term Central Office (of the Ministry of Education) refers only to those officers who were directly involved with the project. Similarly, the term Teachers Union refers only to those members of the Executive who dealt directly with Central Office or represented the Union on the management of the project. At the time, neither Central Office nor the Teachers Union were organisations characterised by consensus on all aspects of the the project and devolution. Consequently, what is said in this report about the views and

² During the initial round of interviews, information was collected also from a small number of teachers and parents in three of the project schools.

actions of Central Office and the Union does not necessarily reflect an agreed position by all members of either group at the time of the project. None of the comments and views attributed to the Teachers Union were provided by any member of the current (1991) Teachers Union Executive.

Finally, although the initial impetus and funding for this review came from Edith Cowan University, it could not have been undertaken without the generous cooperation and contribution of key participants in Central Office, the Teachers Union, and the seven project schools.

CHAPTER TWO

BARRIERS TO WAIVING EXTERNAL RULES

Two types of rules governing the operation of schools can impede devolution: system-wide rules that are external to and imposed on the school from without; and internal rules that a school constructs and imposes on itself. This chapter examines the barriers to waiving the external rules challenged by the project schools. The next chapter does the same with respect to the internal rules.

External rules are embodied in the Education Act and in Ministry regulations, administrative instructions, ideologies, policies, guidelines, expectations, practices and structures. They can be formal or informal, verbal or tacit, and written or unwritten.

At the beginning of the project, the schools were encouraged to address these questions: If, within the constraints of existing resources and teacher workloads, you were given a free hand to organise your school as you like, what changes would you make to improve the learning outcomes for students? How many of those changes do you feel can not be implemented because it would be against the rules? In response to these questions, the schools came up with some thirty proposals. They are summarised on Table One.

A feature of the proposals is that only a quarter of them were requested by more than one school, namely those relating to: teacher reliefs, ancillary staff, the handyperson, staff selection, the use of Regulation 188 allowances, de-enrolling students, and the budget. Most of the proposed changes were proposed by only one school, though not the same school. Clearly, different schools felt constrained by different rules. That created a problem. If only one school challenged a rule then what

Table 1: Proposals Challenging the 'External Rules' That Govern Schools

Proposals approved by Central Office	Proposals not approved by Central Office
<ol style="list-style-type: none"> 1. Flexibility and control over the teacher relief system. 2. Appointment of a permanent on-site 'handyperson' to replace BMA callouts for minor repairs. 3. Greater control over the school budget as from 1989. 4. Organisation of school camps involving an overnight stay without having to gain the District Superintendent's permission. 5. Suspension of students without immediately notifying the District Superintendent. 6. Acceptance of corporate sponsorship to establish a computer-based independent learning skills program. 7. Investigation into the possibility of introducing a nine day fortnight and a longer school day. 8. Commercial packaging of primary curriculum support material. 9. Specialist advisory assistance - speech and motor coordination. 	<ol style="list-style-type: none"> 1. Flexibility in allocating the duties of ancillary staff. 2. More support staff to relieve deputies and teachers of clerical work and routine administrative duties. 3. An increase in the teaching staff establishment. 4. Representation on selection panels for all promotional positions and input into job descriptions and selection criteria. 5. Incentives to keep excellent long serving teachers at the school. 6. School participation in selecting teachers who match its ethos. 7. Bi-annual control over the school grant. 8. Replacement of deputy principal with alternative limited tenure positions. 9. Flexibility to spend Regulation 188 allowances on extra clerical assistance or any other purpose appropriate to the school's need - for example, short term projects. 10. An extra promotional position between head of department and teacher. 11. Conversion of 0.2 SDO allowance into a clerical assistant 0.4. 12. The exclusion of students who refuse to comply with school standards of dress, work habits, and productivity. 13. De-enrolment of upper school students who are absent too often. 14. A 'duty of care' statement from the Ministry. 15. The right to become academically selective. 16. Parents to supervise students during lunchtime. 17. Central inservicing of teachers who counsel students for the Unit Curriculum and who conduct student goal-setting programs. 18. A return to the previous centralised system of school finance. 19. Centralised production of complete teaching packages for each unit of the Unit Curriculum. 20. The Ministry to collect fees from defaulting parents by taking them to court. 21. A Ministry consultant in each subject to provide the necessary service to schools relating to: staffing, curriculum directions, physical resources, and advisory assistance including inservicing of teachers.

should be done - change the rule to allow the school to become self determining, or leave the rule intact and exempt the school from it. In the event, Central Office allowed each of the approved proposals to be trialled in the school that submitted it. Then, subject to a successful trial, a decision was taken about changing the rule for all schools.

The most remarkable feature of Table One, however, is that Central Office either rejected or placed on hold twice as many proposals as it approved. The rejection rate becomes more striking when a closer look is taken at the status and outcome of the approved proposals.¹

Only the proposals on teacher reliefs led to changes in Ministry regulations and thus became part of the system.

The handyperson trial did not lead to a permanent position being created in other schools. Despite classing it as "successful", Central Office terminated the position as of 19/12/1990.

In 1990 all schools were granted greater control over their own budget, but that occurred as part of a planned progression towards giving schools full financial autonomy - not as a result of the project.

It is doubtful whether organising school camps and suspending students independently of the district superintendent represented much of a gain for local autonomy. Central Office did not grant permission on these matters beyond the trial school. Moreover, one principal questioned whether the regulation on student suspension existed and said: "If it is a regulation, then I've been operating outside of it for years."

The proposal on corporate sponsorship challenged a lack of policy in that area and highlighted the inadequacy of the existing 'rules'. Substantial corporate sponsorship is a recent phenomenon in Western

¹ Details of these proposals can be found in Appendix Two.

Australia. Since the completion of the project, a number of other schools have entered into agreements with private companies. Without central guidelines there is little to stop all schools taking corporate sponsorship on board, apart from success in attracting it.

Nothing came of the proposals regarding the nine day fortnight and a longer school day because time constraints prevented the trial school pursuing the investigation. One Teachers Union leader made the observation that:

"Approval was only given to investigate, not implement the thrust of these proposals. I don't believe the Ministry ever had any intention of approving or implementing them."

The proposal for commercially packaging primary curriculum resources seemed to go no further after it was approved.

Support for the trial school requesting specialist advisory assistance in speech and motor coordination was limited to a one-off grant of eight teacher relief days.

Central Office initiated the project, encouraged schools to challenge the system, and indicated its willingness to waive the rules. Why then were so few proposals approved? Economic, ideological, bureaucratic, legal, and industrial factors form a large part of the answer.

Economic Factors

Two schools requested a change in the rules governing the number of permanent promotional positions available to staff. They wanted an extra position created between teachers and heads of curriculum components. Central Office rejected the proposal on the grounds that it depended on resources beyond the existing levels of allocation. Several requests asking for an increased staffing allowance in the student service area met with a similar response, namely:

"The intent of the project is to assess what we are currently doing and see what can be achieved within the school's existing budget. The final outcome may in fact be a clear indication that the schools can not move towards self-determination without additional funding, however we would like to see all conclusions postponed until a thorough investigation of all possibilities has occurred. In short we are not in a position to provide the school with a trial that requires ongoing financing."

A number of project schools asked for more support staff. They claimed that teachers were engaged in large amounts of clerical work and routine administrative duties. One school estimated that the timetabling function performed by a deputy principal contained an 80% clerical component. Extra support staff would free deputies to play an educational leadership role and free teachers to devote more energy to their professional tasks. Apart from the handyperson trial, Central Office rejected these proposals. It re-emphasized that the intention of the project was not to find areas where more resources are required, but to encourage schools to consider alternative ways of using current resources.

In short, despite the guidelines stated at the outset of the project, some proposals boiled down to requests for ongoing additional funding. As such they were regarded by Central Office as part of a tendency to view solutions as more of the same medicine. The following examples typify this tendency: if the workload of teachers becomes excessive, appoint more teachers; if deputy principals can not get to important professional work because of endless administrivia, create a third deputy position (see Appendix One).

For budgetary reasons Central Office could not approve such requests, particularly in light of the certainty that other schools throughout the state would claim equal rights to any increase in the allocation of staff. Like all other government departments, Central Office was constrained at the time by principles laid out in Managing Change in the Public Sector.² It was also guided by the view that to regard solutions as 'more of the same' only reinforces a basic organisational principle -

that problems always expand to exceed the resources allocated to solve them.³ The rationale underlying the project was that solutions could arise from schools working 'smarter, not harder.'

Ideological Factors

Issuing schools with a blue sky brief to challenge the system created an impression that all things were negotiable. It soon transpired that this was not the case. Central Office had certain fixed ideological commitments to maintain, such as those concerned with equity, students' rights⁴ and self-determining schools. Three sets of proposals can be cited here.

Firstly, one of the smaller project schools, with a declining enrolment, faced the prospect of closure. Among its strategies to fend off that fate was a proposal to become an "academic extension school, attracting students from country centres and areas, in addition to current metropolitan students." In effect, the school was asking for a long standing central policy to be waived so that it could become academically selective. However, because of the fundamental importance of the policy being challenged, the Ministry expressed its implacable opposition to the proposal.

Secondly, the same school requested the right to reject or cancel the enrolment of any student who refused to comply with school standards in

² Government of Western Australia (1986), Managing Change in the Public Sector. A parliamentary white paper presented by the Hon. Brian Burke, M.L.A., Premier of Western Australia, Perth.

³ See Appendix One.

⁴ "I've never heard the Ministry talk of students' rights - parents rights perhaps" (Teachers Union leader).

areas such as dress, work habits, and production. The Ministry did not approve that proposal; it pointed out that all students had the right to attend their local state school and that this right must be maintained.

Thirdly, the reforms of 1987 introduced a new ideology and set of values, norms, and expectations. It was not this new culture and structure that Central Office had in mind when it encouraged the seven project schools to challenge the rules. Nevertheless, some schools did, and thereby added support for a return to centralisation rather than devolution.

For example, one proposal asked for centrally-provided inservicing to help teachers counsel students for the Unit Curriculum and implement a personal goal-setting program. Another requested Ministry involvement in collecting schools fees from defaulting parents by taking them to court. A third virtually recommended the re-instatement of centrally-based subject superintendents by saying:

"There is a need for a Ministry person (consultant) for each subject to provide the necessary service to schools relating to: staffing of that subject; curriculum directions for that subject area; physical resources, both their development and maintenance; advisory assistance including inservicing of teachers of that subject."

A further proposal expressed a preference for the previous centralised system of school finance on the grounds that: it allows greater economy of scale, time efficiency, and continuity; it reduces stress caused by infighting of subject staff and the bias of principals; and it prevents schools suffering from any lack of local expertise in accounting and negotiating skills.

Finally, one proposal asked for the "centralised production of complete teaching packages for each unit" of the Unit Curriculum (for Years 8-10). Every unit was to have objectives, a teaching and assessment program, and relevant teaching/learning materials. Apart from being time and cost effective, centrally-based curriculum development was commended

in the proposal as a way to provide uniformity across the system and reduce problems associated with student transfers. Finally, it was seen to have the advantage of taking the pressure off teachers and allowing them to concentrate more fully on face-to-face teaching in the classroom.

On all of these proposals the Teachers Union was silent.⁵ For its part, Central Office approved none of them. It acknowledged that they were designed to help schools manage change, but not the sort of change envisaged in the Better Schools Report. Rather than free schools up to become self determining, said Central Office, such proposals were more properly the responsibility of district offices, subject associations, and the schools themselves.

These proposals suggest that to some extent the project backfired. The project offered schools a blue sky brief to challenge rules which governed the way they operated. It also charged them with doing that in a collaborative fashion. Given the chance to participate, some teachers took the opportunity to register their opposition to the Better Schools Report. In these cases, instead of functioning as an instrument for managing change, the project became a vehicle for the confirmation of conservatism.⁶

⁵ Several Teachers Union leaders qualified this observation:

"After the big chop in Central Office following the Functional Review, Union policy was for the return to centralized advisory services and we were successful in having a pool of 27 consultants installed."

"The Union had a strong policy in favour of the centralized production of curriculum materials."

⁶ Several principals objected to this conclusion:

"We were trying to save teachers from excessive workloads and that is not conservatism. In 1988 teachers were madly writing curriculum that should have been done centrally. It was a bad year for teacher morale. We wanted centralization of workload, not responsibility."

The submission of proposals which were clearly contrary to the stipulated parameters of the project, and the Ministry's ethos, can be understood in terms of the different agendas which schools brought to the exercise. For example, in response to the question, "Why did you join the project?" several schools said:

"To develop proposals and programs to ensure the survival of the school."

"There were lots of changes suggested in the Better Schools document that the staff had many concerns about. They felt the project was a way to ensure that the people who were going to make the decisions knew what the teachers in schools really felt. The staff felt optimistic that they would have a real opportunity to have their ideas heard even if it did not directly influence the decisions."

Also, it seemed that at times the project was used to obtain authorisation and provide cover for innovations which jarred with the prevailing climate of acceptability.

Bureaucratic Factors

In terms of line management, the Central Office group immediately responsible for what went on in schools during the project was the Operations Directorate. It consisted of four Directors of Operations and 29 District Superintendents and it had the largest representation on the Corporate Executive of the Schools Division. On a number of counts it had little reason to be enthusiastic about the project.

⁶ (Continued) "Don't throw the baby out with the bath water. This is not a definition of conservatism. Some centralization may be seen as a method of reducing common roles. Schools may have been redefining the role of centralization; that is, repetitive and mundane work should be taken over by Central Office to release teachers for more important work."

Firstly, some members of the Operations Directorate may have been ideologically lukewarm about the whole process of devolution. For example, in relation to the restructuring of 1987, one of them said:

"As superintendents were not involved in framing the new visions/directions for the education system, some did not necessarily agree to this way of doing things. They didn't clearly understand the major concepts and it seemed some didn't accept the importance of the vision. My observations indicate that this interfered with communication between Central Office and the school face, because teachers quickly perceived a diffidence on the part of some superintendents to give confident, wholehearted commitment to this new vision" (Chadbourne 1990:104).

Secondly, saying "no" to requests to waive regulations would have meant less hassles, less risk taking, and less burden of responsibility than saying "yes". Similarly, it would have been in the interests of the middle managers to have more specific rules and regulations, not less; it would have been in their interests to work within a tight regulatory framework than to operate just from general principles. Moreover, apart from being more complex and threatening than forcing compliance with the rules, having to make decisions just from an overarching policy direction might have reduced the authority of the middle managers.

Thirdly, not long after the project got underway, the Government adopted a milder approach to promoting Better Schools. For political reasons it began talking down change and talking up the status quo. As a consequence, said a senior Central Office Executive:

"We didn't get strong political leadership on this. The government let Better Schools go. In America, the politicians would have staked their careers on it. But here, there was no selling of the reforms (during the period of the project) and that invited backsliding, fed the doubts of the middle management, and reinforced a perception that Better Schools was only a temporary thing."

Fourthly, initially the project operated independently of middle management in Central Office. The project manager reported directly to the Executive Director of the Schools Division. Under those conditions, it would have been possible for middle managers to see the existence of

the project as undermining their authority, or as constituting a vote of no confidence in their capacity to promote self-determination.

When the project wound up, its supporters proposed setting up a "Yes Bureau" in Central Office and secured \$100,000 from Commonwealth funding to do it. The "Yes Bureau" was to be run by an independent person, a "Better Schools Ombudsman", to whom schools could appeal when told the rules could not be waived to allow them to do something in line with Better Schools. A performance indicator of the Bureau was to be the number of times it said "Yes." Some middle managers were less than enamoured with the whole idea. They saw decisions about the operations of schools as lying in their domain. The "Yes Bureau" never got off the ground.

Legal Factors

Central Office rejected a number of proposals on the grounds that they lay outside its legal jurisdiction. For example, one school sought bi-annual rather than yearly control of all monies concerned with school development, library, stock, texts, minor works, minor special education projects, and subject grants. While acknowledging the importance of forward planning, Central Office pointed out that,

"As the government of the day determines the education budget as part of the state budget for the forthcoming financial year, it is not within our ability to project a budget to schools beyond the financial year."

Another school sought to reduce the clerical workload and cost attached to monitoring the attendance of Year 11 and 12 students. It proposed that the class roll be marked each teaching period but only sent to the front office every six weeks. Students who failed to meet attendance requirements, regardless of the reason, would be de-enrolled. Central Office's response included the following points:

"Students above the legal leaving age who are properly enrolled in a school and who do not attend regularly or conform to the school's rules may be suspended under regulation 183 (a) 3 in the same way as lower school students are suspended under regulation 35. We do not have the legal authority to override this regulation."

Two proposals designed to reduce teachers workloads met with legal obstacles. The first involved the Parents and Citizens Association selecting and paying five parents an honorarium to supervise students at lunch time, thus relieving teachers of the task. A request for a legal opinion initiated by the Teachers Union brought the scheme to a halt. The Crown Solicitor's Office advised that the principal may be vicariously liable if: (a) parents were injured or assaulted whilst performing their duties; and (b) students were injured whilst under the supervision of a parent.

The second proposal, concerned with decreasing the amount of supervision duty undertaken by teachers, asked the Minister to provide a statement of what constitutes valid duty of care. Central Office replied:

"Your request for information regarding the requirement of schools to satisfy their responsibility to provide adequate supervision raises complex issues. Our advice from Crown Law is that it is not possible to specify in advance the level of supervision required of staff due to the number of variables that pertain to any given situation, e.g., number of children, nature of the activity, proximity of staff, type of equipment in the area, children with special needs, etc."

Industrial Factors

A fairly common sequence of events throughout the project was as follows: a school would submit a proposal that challenged some aspect of the system; on examining the proposal, the Teachers Union would find legal or industrial obstacles and inform Central Office of the difficulties; Central Office would then write to the school saying that the proposal could not be approved. In relation to this sequence of

events, Central Office considered the Union had a lot to answer for, the Union placed responsibility for the frustration at the feet of Central Office, and the schools felt let down by Central Office and the Union.

Central Office's Perspective: Central Office believed the Teachers Union was opposed to the project from the start. The Union had come out against the Better Schools Report on industrial, educational, and ideological grounds. It saw devolution as reducing the power of unions to marshal their forces, as making schools cheaper rather than better, and as being part of the 'new right' push for deregulation, privatisation, and promoting the interests of the wealthy at the expense of working class children. As long as the Union took that view of devolution, thought Central Office, it would not want to support a project which was designed to advance self determination in schools. Indeed, said Central Office:

"The Union was going to ban the project because it was unhappy with the kind of things being talked about. It thought schools were being led to believe that they could change all things with the blue sky brief. It felt threatened by what it saw as a back door implementation of the Better Schools Report."

"During the industrial dispute, the project generated a lot of discussion. The Union considered it to be subversive. The objections were deep. The Union said, 'We don't want schools to be different from each other. We have a fundamental objection to getting schools to find solutions that vary with each other.' "

From where Central Office stood, the Union was seen to be more concerned with promoting the conditions of teachers than the education of children.⁷ It was also seen to pursue a "pre award restructuring, pre-Perestroika" strategy. The inflexibility of that approach, said Central Office, put the Union offside with the project. For example:

⁷ "Yes, that is what a union is for. It's the employer's responsibility to be concerned with educational outcomes" (Teachers Union Leader).

"The system had evolved progressively to the point where by the mid to late '80s things had become so bound up with agreements and rules between the Teachers Union and the Ministry that any exception to the rules had to be agreed to privately. There were under the table deals and trade offs for individual teachers and officers. But by and large, all was locked up. The Managing Change in Schools project proposed that people in schools could decide what should be locked and unlocked and that was threatening to the Union."

"The Union wanted agreements on uniform principles that could be invigilated. They wanted uniformity to protect teachers. Then they would try to jack up the conditions with leverage. So the Managing Change in Schools project was anathema in that kind of industrial environment."

"The prevailing view of the Union was that we wanted to go ahead and not protect teachers. They saw us as industrially naive, as looking for simple solutions to complex problems. We knew the rights of teachers had to be protected and we were going to do that."

Because the project was seen in that light, said Central Office, the Union went out of its way to turn teachers against the project, to find fault with proposals, and squash experimentation.

"The Union didn't want to see experimentation. That made it hard for proposals to be generated because their reps in schools and on the project let teachers know that the project was dangerous. In that way the Union constrained the number and kind of recommendations formed by schools. It squashed proposals at both ends - at the generation and approval ends."

"The proposal for using parents to supervise lunch duty was worked out well at the school level, but the Union spent a lot of time and use of lawyers to attack the legality of it and undermine it.⁸ That was part of a pattern. Instead of finding a problem and solving it they would find a reason to stop the solution. They were not in the spirit of trialling change and giving schools increased flexibility."⁹

⁸ "It wasn't worked out well at the school level. The Ministry had no coverage if parents or the kids got hit or hurt or broke an ankle" (Teachers Union leader).

⁹ "There was no deliberate stonewalling. But there were issues that had to be dealt with. The Union's job was to find the issues. It was the Ministry's job to find the solutions" (Teachers Union leader).

"The Union didn't want schools to have a different organisational structure. They were out to limit the scope of the project and in various ways bog it down. A whole lot of communication problems made it difficult to do anything because we had to have meetings with every union and it became unwieldy."

The Union's Perspective: Central Office formulated and launched the project without consulting the Teachers Union. "I never knew it existed," said a Union Executive. "Had I known I would have thought, 'What are they up to now?'"¹⁰ He went on to say that months after the project started,

"I was taken aside one day by (a senior Ministry officer) and told, 'We have had this project for awhile. It would be useful to have a Union rep.' He said I could nominate someone from the Union, anyone. He told me, 'We have this view that schools do inappropriate irrelevant things - teachers complain about their workload; we want to find out what teachers are doing badly and unnecessarily and how they can do things more efficiently.' That seemed responsible to me and in that spirit we tackled it. I accepted the Ministry at face value when they said they wanted cooperation as part of the industrial agreement. It's unfair to say we opposed the project. We could have closed it down."

There were aspects of the project, however, that the Union did oppose. It objected to the Ministry telling schools to negotiate their proposals directly with unions, and it objected to the project encouraging schools to trial changes beyond their capacity, changes which impinged on existing industrial agreements.

"There were some areas where you couldn't consider the educational implications in isolation from the industrial implications. The Ministry wanted to look after the industrial implications later on."

¹⁰ "Perhaps the Teachers Union was not officially notified about the project until it was several months down the track, but unofficially the Union was well aware of the project. One of the project school principals was on the Union Executive at the time and the project was advertised in Education News early in 1988" (School Principal).

"We were concerned that the Ministry treated some issues irresponsibly. For example, the proposals from (.....) School - we didn't think they were appropriate to the government system. We thought the Ministry was irresponsible to allow the school to go down the track without making the full implications known. The schools weren't told and any attempt by our rep. on the project to tell them was resented."

"Some proposals had major, system ramifications. It was unfair to encourage staff to form them if they weren't told the industrial, legislative implications. They weren't told because the Ministry didn't know the implications."

The following two items were listed in the official duty statement of the Teachers Union representative on the project:

- o Discussion with appropriate Ministry personnel to ensure the people within the project are legally protected whilst undertaking the trial proposals.
- o Liaising with the Union office and senior officers regarding industrial implications of proposals.

Therefore, said the Union leaders, finding the legal and industrial ramifications of proposals was simply a required part of the job, not an attempt to torpedo the project. For a more appropriate indicator of commitment to the project, observers should look at what action was taken once the ramifications were identified. A range of comments express their views on this matter:

"I'm not sure parents couldn't undertake lunch duty. If there were legal restrictions, there didn't appear to be any initiative on the part of the Ministry to remove them. The Union was in favour of parents doing lunch duty."

"It needs to be pointed out that Central Office did little, if anything, to negotiate or resolve or even talk about these obstacles."

"The Ministry was washing its hands, relinquishing its responsibilities, so when schools came up with a problem, the Ministry lacked political will."

"It wasn't Union policy that teachers not undertake yard duty. If the Ministry were serious about it they should have been the employer, not the principal. They shouldn't have said to the school, 'You go off and do it yourself'."

Moreover, the Union saw its representative on the project as providing a level of base support. For example, this person: liaised with the CSA

and Miscellaneous Workers Union to allay their concerns; carried out administrative and clerical tasks so that important organisational details were not overlooked; collected information on the industrial, legal and financial problems that had to be addressed to make the proposals work; and assured people in Central Office who fielded complaints about the project that "things were being taken care of."

Finally, the Union claimed that, "A number of aspects of the Better Schools Report we had no objections to." Furthermore.

"Many proposals in the Better Schools Report could have gained wide acceptance if the Ministry knew about managing change. For example, Western Australia led the way in merit promotion. The change was managed over five years and there was very little adverse reaction at the grassroots level. It was an excellent model of Union/Ministry change. When I asked the Ministry why not adopt the merit promotion model with the Better Schools Report, a senior Ministry Executive told me, 'I've got other masters now who expect quicker change'."

The Schools' Perspective: Generally, the schools blamed the Union and Central Office equally for the rejection of their proposals. For example, the Teachers Union representative on the project recalled that:

"The principals resented my involvement and accepted me under sufferance. I had to prove I was of some use. (.....) saw me as a threat. (.....) was strongly opposed to my involvement. He didn't want me in his school at all."

....(the principal) was cross when I attended a Union meeting (at his school) to inform members of the Union's view on the Better Schools Report. When I got to the meeting I was told, 'We're no longer in the project.' He objected to my access to his staff."

Many of the teachers in the project schools were also antagonistic to Union involvement. Some threatened to resign from the Union if it stood in the way of their proposals. For these teachers, the interests of their school took precedence over what the Union saw as the interests of teachers as a whole.

On the other hand, the following comments from principals, teachers and parents of the project schools are significant. They suggest that

Central Office was held to be just as responsible as the Union when proposals were rejected on industrial grounds.

"The startling opposition from unions, both the Miscellaneous Workers Union and the Teachers Union, was exhausting and demoralising. The apparent lack of preparedness on the part of Central Office to tackle the seemingly obvious opposition to change from the unions was most depressing."

"There were times when the school felt totally on its own as it tried to challenge existing practices. It seemed that the unions did not want change and that some of the personnel in at Central Office wanted to maintain the status quo."

"The message sent was 'challenge the system' yet the message being enacted was 'don't bother to challenge the system, it's too hard, and if you do you are on your own'."

"The schools wrote an ethos (statement) out of it (the project) but it turned sour on the staff selection bit. The Union complained and the Ministry supported the Union. The school staff got very excited about the proposal. But now the staff feel that whole concept of self management is a bit of a joke."

"The school wanted a statement of duty (of care) from Head Office but we never did get it. The children could have been put into the parents' control for supervision for lunch time, but it wasn't supported by the Ministry. The Ministry gave in to the Union. It was frustrating to the school. So the Ministry is not really dinkum for the 'clean slate' approach."

"The project initially encouraged schools to go outside of the current rules. We were led to believe that it was possible things would get the go ahead. But in reality the Ministry was not prepared to devolve and not prepared to resolve the tough industrial issues."

Five Examples of Industrial Factors at Work

- (1) A proposal common to a number of schools involved ancillary staff. At the time, senior high schools employed non-professional staff to work in the front office and to support teachers in home economics, science, and the library. Teachers in other areas such as manual arts, art and social studies claimed they needed a similar level of support. The project schools decided that greater efficiencies would be achieved if they

had flexibility in the allocation of duties - for example, if the science technician could work in the arts area under the direction of the senior teacher, or if a cleaner or library assistant could work in manual arts or media - again under the direction of the senior teacher. Furthermore, said one school principal,

"We also proposed flexibility within a single category, flexibility of hours within an area. For example, getting a three-fifths lab technician in for five-fifths' time for a busy week and only one-fifth during a slack week".

The Teachers Union sounded the alarm on this proposal. From contact with the other unions it found that:

"The CSA (Civil Service Association) was volatile and resistant because its members complained about losing jobs. The Misco's (Miscellaneous Workers Union) were not as resistant. They saw the potential but wanted to be consulted."

Subsequently, Central Office contacted the schools saying,

"This proposal is going to require a fair bit of working out. Ancillary staff, in the main, are employed by three different unions - Teachers Union, Civil Service Association, and Miscellaneous Workers Union. Preliminary discussions indicate that flexible deployment of staff who are members of a particular union may be possible; however, deployment across union boundaries will be more difficult. I am not in a position to give you the approval without having first acquired the support of the relevant union. I believe that you and your staff will need to play a part in the negotiations. Perhaps the next step would be for your union representatives to consider this proposal. I would be happy to meet with appropriate staff in due course when you have acquired backing from union representatives at the school."

The schools tried the "next step" but, as one principal pointed out:

"The Miscellaneous Workers Union and the CSA jumped in as soon as they knew we wanted to review the roles of their staff. They opposed a decrease in the numbers of staff in any category and said, 'We don't like what you're doing.' The (teaching) staff said, 'Why fight it?' and so no attempt was made to negotiate with the unions. Teachers are not skilled negotiators and they felt intimidated by the industrial muscle of the unions and the possibility of statewide industrial action."

(2) One school requested to be represented on selection panels for all promotional positions and to have input into the job descriptions and

selection criteria for those positions. It also wanted freedom to keep excellent, long serving teachers at the school by offering them incentives such as - a reduced teaching load, additional salary increments, and mentor-teacher status. Central Office supported these proposals in principle but informed the school that it would have to negotiate them with the SSTUWA before they could be implemented. That suggestion met with opposition from the Teachers Union which wrote to Central Office saying:

"It is industrially inappropriate for the school to be negotiating directly with the SSTU. Working conditions for teachers must be centrally negotiated and determined."

Central Office wrote back accepting the Union's point. No further action was taken by the school.

(3) Another school asked for greater scope and freedom to choose staff sympathetic to its ethos. It wanted to match up the schools' needs with staff appointed to the school. Part of the proposal involved advertising the school's ethos as a way of assisting teachers to make their choice in transfer applications. The Ministry supported this part of the proposal and paid for an advertisement in the Education News.¹¹ However, on the actual selection of staff, Central Office said:

"Although the Better Schools Report clearly includes staff selection as a part of the devolution of decision making to the school level, there are industrial issues which are still to be resolved. The most that can be done in 1989 is for the group you mentioned (District Superintendent, Principal and two elected teachers) to provide Primary Staffing with the information about the staff you require so that they can match the person with the school's needs."

On receiving this reply, the principal of the school wrote back:

¹¹ "The Union received more calls over this advertisement than anything. There was a strong reaction. Teachers objected to the big noting and ideology involved and said, 'that's the sort of thing private schools do'" (Teachers Union Leader).

"The (managing change project) committee was delighted with the Ministry response. Their request now is that (.....) School be involved with the short listing of applicants."

At that point, the Teachers Union joined in the correspondence:

"It would appear that the communication from Central Office regarding this proposal did not enunciate the Union's total opposition to (.....) School personnel being involved in staff selection. I reiterate that the SSTUWA opposes school based personnel being involved in the selection of school staff."

The school did not become involved with the actual selection of its teachers.

(4) A senior high school proposed freeing up teachers' use of DOTT (duties other than teaching) time. Under the proposal, teachers would report to school in the morning and then be able to use their DOTT time as they saw fit - for example, leaving school to complete personal business. The Teachers Union requested a legal opinion on the issue of workers' compensation. That opinion was not obtained but an officer with the Ministry's Human Resources Policy Branch made inquiries and reported as follows:

"I have discussed the question of workers' compensation coverage for teachers utilizing DOTT time with a representative of the State Government Insurance Commission. Our Insurers are of the view that these activities are not incidental to the teachers' employment and as such do not come within the guidelines of the Workers Compensation and Assistance Act."

(5) Finally, one school sent Central Office three additional proposals concerned with recognising teachers' strengths, fostering "master teacher" concepts and planning careers for "master teachers". There appears to be no record of Central Office's response to these proposals, though the Teachers Union representative on the project wrote a report on them.

The first proposal advocated the introduction of performance management for teachers wishing to be recognised as "master teachers".

It requested Central Office to recognise "master teachers" with salary and administrative time allowances. In relation to the performance management aspect of this proposal, the Union made these points:

- (a) prior to any appraisal, a job description must be prepared and approved and be applicable state wide;
- (b) any system of performance management must be developed by the Ministry in consultation with the Union, be linked to a professional development program for all teachers, and have an explicit funding commitment.

The Union also objected that the exclusive term "master teacher" was contrary to the equal opportunity policies of both the Ministry and the SSTUWA.

The second proposal outlined a case and program for gaining work experience outside the field of education. The Union commented that the legal ramifications of this proposal "need to be explored along with the clarification of entitlements for Ministry employees."

The third proposal involved releasing teachers from face to face teaching duties - for up to five hours per week matched by five hours of the teacher's own time - to develop career expertise by undertaking a recognised course of study. Since this proposal constitutes an alteration to working conditions, said the Union, it will need further discussion and negotiation.

"Generally," said the Union representative, "the proposals constitute restructuring. As such, the school does not have the support for these things until a salary increase representative of the change is awarded to those involved."

Closing Comments

The influence of some of these factors could have been anticipated by the seven schools at the beginning of the project. From the outset, the schools were told that their proposals were not to require ongoing additional funding. Before the project started, the Teachers Union

opposition to key aspects of the Better Schools Report had been declared often and openly. And experienced principals would have been aware of the general possibility, if not the particular details, of legal barriers to waiving the rules. On the other hand, the strength of Central Office's ideological commitments at the time may have been more difficult to gauge. Also, school staff may have thought that all opponents of the structural reforms were removed from Central Office during the 'restaffing' of Senior Officer positions in 1987.

Despite what might have been predicted, the project schools believed in good faith that Central Office would be able to waive the rules and consequently held high hopes for the success of their proposals. Not surprisingly, they became confused and disappointed by the outcomes. For example, several principals commented:

"We were told to do some real rule busting but every time we did we were given ten reasons why not."

"I felt demoralised by Table 1 because we saw Managing Change as exciting. Then we saw all the restrictions on us. We had to accept bureaucratic regulations. So the benefit for us has been a clarification that we are self managing, not self determining".

This is not to say that all the schools were completely disillusioned with Managing Change in Schools. Some principals suggested the project be re-established. Others said:

"The project may be closed but not the ideas. A lot of good ideas are still there. I hope the ones not given the nod will be taken on board by the Ministry."

"The project was stymied because it wasn't allowed to go through its full cycle. Finding out how to remove the constraints takes time and commitment. We should take the long range view and say, 'How can we make it happen?'"

"There were time issues which didn't allow the full implementation or trialling or setting into motion the removal of obstructions. The project's brief was to identify rules that needed changing. I don't think it was ever said the snap changes could be made."

Various contextual changes have occurred since the project wound up: the Teachers Union is now under new leadership and to some extent so is Central Office; the Union and Ministry recently forged a Memorandum of Agreement; attempts have been made to narrow the Them and Us feeling, through the development of statements such as 'Our Shared Ethos'; and a Ministerial Taskforce spent all of last year investigating ways to improve the conditions and status of teaching.

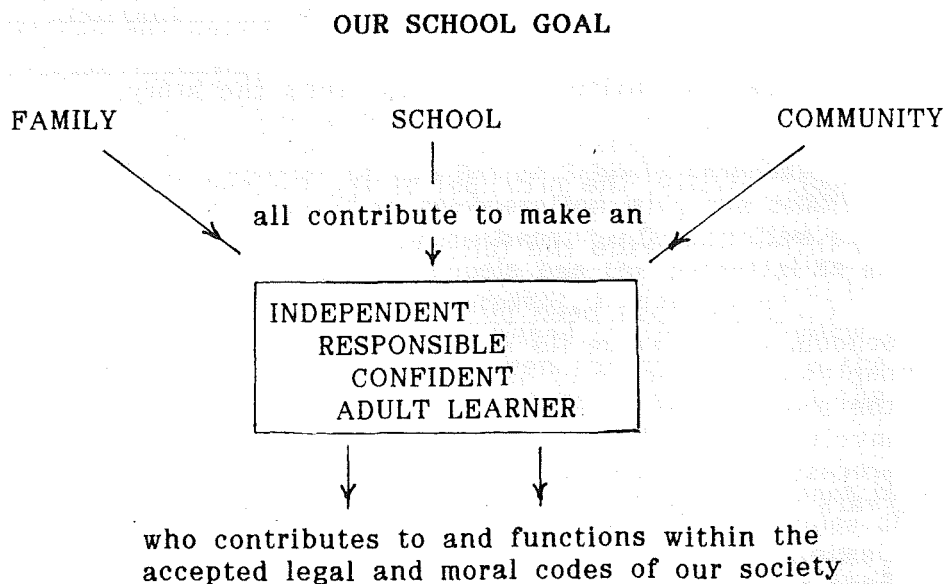
But, have these developments removed the economic, ideological, and legal barriers to 'rule busting'? Was the Union opposition to the project a function of the personalities of its leaders at the time or a function of characteristics inherent in the industrial relations structure? Has the question of what constitutes an appropriate role for Central Office's middle management within a system of self-determining schools been satisfactorily resolved? In short, do the five factors that impeded Managing Change in Schools still exist and would they operate with the same effect to frustrate any new project?

CHAPTER THREE

ONE SCHOOL'S EXPERIENCE AT RESTRUCTURING

One of the most controversial initiatives came from the district high school in the project. It was considered a significant advance by Central Office in 1988 but a disaster by some Teachers Union leaders. A separate chapter has been devoted to this initiative because it illustrates varying perspectives on the relationship between a waiver system and a limited form of enterprise bargaining.

At the beginning, members of the (.....) District High School community spent a lot of time among themselves reaching agreement on the following mission statement.



The initial discussion to agree on the school's goal produced long term benefits. Staff, parents and students now have a clear sense of the school's purpose and a shared vision of what they can achieve.

As a next step, the school looked at ways in which its own structure could be re-shaped to best achieve the agreed objectives. One proposal

from the staff centred on the concept of organising themselves into four teams, each with an elected leader. They felt that whilst the statement of purpose provided a focus for the school as a whole, smaller teams would be better equipped to respond to the needs of students in their care. According to the principal that meant, "constructing programs on the basis of an analysis of where students are and where the school wants them to be." Other intended outcomes of the proposal included: breaking down the 'territoriality' of teachers by encouraging them to share professional strengths and experiences; providing more leadership opportunities for staff; improving communication between teachers; solving problems at the grassroots level; and enabling teachers to structure cooperatively the most effective learning environment for students.

Controversy over the proposal arose from the school's request to replace the deputy principal position with a number of limited tenure leadership positions. The correspondence between the School, Teachers Union, and Central Office on the issue tells the story.

The School: Firstly, the principal of the District High School wrote to Central Office and made the following points:

1. (.....) DHS has been pursuing the major thrusts of the Better Schools Report since its release. The school has been able to implement a number of aspects of the report quite quickly, owing to the professional development program in which the staff had been involved before the report, and the participative decision making processes adopted with both staff and community over the past four years.
2. School development has so far been concerned with goals, tasks, roles and school structure. Ministry and parental requirements of the school, coupled with differing needs of students from Years 1 to 12 have led to the evolution of a structure based on four task-oriented groups. The groups are: junior primary, upper primary, lower secondary, upper secondary. Teachers are allocated to each group, and form a team which controls resources of time, money and materials in order to achieve specific tasks within the curriculum. Students are allocated to the groups according to parental wishes and/or performance on learning tasks. This team structure is currently being evaluated by the school development consultant from the (.....) District Office.

3. Changes in roles have resulted from the definition of goals and tasks, and from the changes in organizational structure. Teachers act as team leaders, and placement of students according to Year groups has become less important than placement according to performance and/or individual needs/goals.
4. These changes have blurred the primary/secondary structure on which the school's staffing has been traditionally allocated. All team leaders report directly to the principal, and have considerable discretion for decision making within the framework of the school's goals. In particular, the role of primary deputy has become an anachronism. The deputy acts as one of the team leaders, and performs minor administrative tasks.
5. An analysis of the tasks of the deputy for 1989 revealed that most (other than the leadership role) would be more appropriately carried out by a school assistant.
6. The school currently has two team leaders who receive nothing for their efforts and commitment, one who receives an allowance under Regulation 188, and one deputy. All perform similar management tasks.
7. In accordance with the intentions of the Better Schools Report, it is recommended that a more equitable and appropriate allocation of staff resources for the school's requirement would be: four limited tenure positions at a remuneration approximating to the Regulation 188 allowance; some formal status attached to these positions to reflect the responsibilities they carry; and two additional days per week for a school assistant.
8. The staff, including Union branch members, strongly support the proposal.
9. I am a strong supporter of the Better Schools proposals. The changes implemented by staff in co-operation with the community in our school testify to the increased commitment, professionalism and student performance that Better Schools has the potential to give to government schools in general. At present, however, the organizational design of my school is based on the 'ad hoc' that characterizes the point of change between two systems. In the short term this is no problem, and is in fact a necessary part of the experimentation necessary in the change process.

I now request the Ministry to legitimize the change processes in which we are involved, through some formal recognition of the roles of teachers in our school. If extra cost is involved, it is minimal. No extra staffing is sought in this proposal. The appropriate changes can be managed at this time owing to the retirement of the present deputy principal.

My concern is that continued imposition of the roles of the past on the structure of the present will set up tensions in the school that will only be able to be resolved by reducing the time spent improving the design for delivery of quality education, and increasing conformity with those bureaucratic and hierarchical systems recognized by the formal/legal structures of the Education Department.

The Teachers Union: The Teachers Union received a copy of this letter and wrote to Central Office saying:

"Attached is a document dealing with a proposal from the Principal of (...) District High to scrap the position of deputy principal at that school. The proposal as you would be aware, emanates out the 'Managing Change in Schools' project. It is a further example of the need to rein-in this project so that at the end of the day teachers in schools that are participating in the project do not have their expectations dashed or the Ministry left with egg on its face."

Accompanying this letter was a detailed response to the District High School's proposal, prepared by a senior member of the Teachers Union Executive.

The (DHS) statement is extremely loose in its presentation and seems to be totally based on the premise that schools can do whatever they want, for whatever reason they decide.

The paper claims that the school has developed a unique and novel organisation structure. However, no evidence of major difference between (...) DHS and other similar classifications is provided.

There is a complete lack of understanding of promotional structures and how they are related to the organisation of government schools.

The proposition that the deputy position is unimportant because of tasks being undertaken by other staff does not address the issue of leadership (actually identified in the paper in paragraph 5). Line management in this proposition is not considered. If the principal is on leave etc. who assumes the acting role?

The question of recognition - status and remuneration, for teachers who take on particular duties within schools is not peculiar to (...) DHS. Negotiating extra allowances, e.g. Reg. 188 etc is already a possibility for schools. Also school development funds etc. have and are being used in schools for such purposes.

The suggestion of limited tenure positions for people already in the school demonstrates a total lack of understanding of appointments, in that limited tenure positions must be advertised statewide. This means that there is no guarantee that the appointment would be internal to the school.

(...) DHS's problems have been identified albeit they are the result of the "Better Schools" proposal and not specific directives of the Ministry. Despite the principal/staff's support of the proposal, they have absolutely no mandate or mechanism to formally restructure the school to the extent that they remove substantive positions.

The removal of the D.P.P. has direct implications for:

- o the management of the school
- o the incumbent's future
- o the effect on the broader career paths of eligible teachers
- o the future of (...) DHS when present staff move on
- o the lack of comparability between (...) DHS and like schools.

Finally, there is little in the document that effectively supports the recommendation other than the school being led to believe they can do as they wish in educational, industrial or political matters.

Central Office: In reply to the Union's letter and position paper,

Central Office wrote:¹

"Thank you for your letter regarding the administrative structure of (.....) District High School. My response to the proposal has been to monitor the trial of this system of administration. As a means of compensating for the additional work being undertaken by the team leaders, I have authorized two additional Regulation 188 positions to the school for the trial period of 1989."

Central Office also funded teacher reliefs in the school so that the teams could hold planning meetings twice a term.

For the past two years, then, (.....) District High School has been restructured on the model of four self-managing staff teams. Interviews with teachers at the school found that they feel empowered by the new structure. Their work has increased because of many meetings held inside and outside school hours and because of the consensus approach to resolving issues. However, most of them accept the time consuming nature of the participatory process because they enjoy working in an atmosphere of creative problem solving and risk taking. They also report that the sense of worth of what they are doing and their job satisfaction has increased since the introduction of the team approach.

The single most significant factor attributed by students, staff and parents to the success of their school's new structure is the vision and skills of the principal. Among other things, the principal sees himself, and is seen by others, as a consultant to the team leaders. For example, his schedule is carefully planned so that a lot of time can be spent getting alongside the team leaders to provide real on site training. His influence does not stop there. In describing themselves, teachers

¹ "Some Ministry people like to present the Teachers Union as confrontationist. But it's not Union policy to have uniformity. The greatest diversity in our system has come through PEP and PCAP and we didn't oppose those programs" (Teachers Union Leader).

throughout the school regularly refer to "being self empowered", "thinking creatively", "we're professionals", and "we're creative problem solvers." They feel valued and believe that their contribution to the decision making and learning processes does make a difference to student outcomes. Central Office also thought the school made a difference and, at the end of 1988, sent the following letter to the principal.

"You and your staff deserve great credit for the way in which you are pursuing the reforms of the 'Better Schools' Report. The development of your own organizational structure, the delegation of authority throughout the schools, the involvement of the community in decision-making, and the long-term professional development of staff are all part of the total plan to enhance both the quality of student performance and the professionalism and commitment of staff that are the intentions of 'Better Schools'."

In 1990 the deputy principal applied for promotion. The school then wrote to Central Office requesting that, in the event of the deputy's application being successful, the position of Primary Deputy not be filled - in the interests of the longer term future of the four team leader positions. Central Office replied to the principal advising that the Ministry was unable to endorse the proposal. In doing so, it listed the following points as particularly relevant:

- o Regulation 184 (1) (c) states that the school is to be staffed with a principal and a deputy principal.
- o The Ministry would be open to challenge in the Industrial Commission from teachers who could expect to gain the position either by transfer or promotion.
- o There would be a reduction of one promotional position at a time when the Ministry is endeavouring to increase the number of such positions.
- o Any such agreement would be conditional upon Union approval and, like the Ministry, the Union could be challenged for such an agreement.
- o Should the present administration change for 1991, and you have applied for promotion, the proposed structure may not be acceptable to the incoming principal.

CHAPTER FOUR

INTERNAL BARRIERS TO SCHOOL REFORM

In addition to external constraints, the seven project schools were encouraged to challenge the internal rules they had made and imposed on themselves. This involved examining the validity and relevance of their own policies, regulations, ideologies, values, norms, expectations, practices and structures. Three broad questions guided their deliberations. What is the school's purpose? What changes need to be made to achieve that purpose? What internal rules are getting in the way of those changes? Again, the project schools were expected to formulate proposals for change within the limits of their existing resources and within acceptable teacher workloads. The only assistance offered by Central Office was access to the project consultant and some time relief for staff planning.

It was important to the Ministry that schools did make some fundamental changes. The Better Schools Report had made it clear that the individual school should be regarded as the primary unit of change. It also justified massive structural reform on the grounds that it would lead to 'better' schools in terms of improved student outcomes. In fact, said the report,

"Whereas once it was believed that a good system creates good schools, it is now recognised that good schools make a good system" (1987:1).

If the schools did not change, then all the system restructuring would count for nothing.

From the beginning of the project, Central Office transmitted the hope, if not expectation, that the seven schools would adopt a corporate management approach to education. Evidently, Central Office held a series

of interrelated beliefs, namely that: a self-determining school is one organised on the principles of corporate management; self-determination is not as an end-in-itself but a pre-requisite for schools to become efficient and effective in terms of improving student outcomes and meeting the changing needs of local communities and the Government; and unless schools exercised self-determination within the framework of corporate management, they might head off in unproductive directions.

By 'corporate management', Central Office seemed to mean schools which were characterised by the following features:

- o a decision making process which formulates organisational goals, priorities and targets from a broad base of policy advice;¹
- o a view of development which regards individual schools as the optimal unit of change and places the needs of the 'body corporate' above the needs of its member parts (a concept of the school being more than the sum of its parts), while at the same time ensuring that any definition of the school's corporate goals is 'nested' within the broader framework of the Ministry's corporate ethos;
- o a school development planning process in which intended outcomes are based on the school's corporate goals, performance indicators are attached to objectives rather than strategies or tasks, priorities are determined from an analysis of data collected through a management information system, resources are allocated in accord with the school's purposes and priorities, and evaluation is based on criteria constructed for each performance indicator;
- o a process of school accountability which is results-oriented - that is, based on student learning outcomes rather than school, staff or student inputs;
- o a process of teaching staff accountability which requires teachers to monitor their performance in relation to the objectives they have set, establish priorities for improvement

¹ At a Government level this means the Minister of Education consulting not just with 'politically neutral and expert civil servants' as has traditionally been the case, but also with private consultants, political advisers, and committees of inquiry. At the school level it means principals consulting not just with teachers, but also with support staff, parents, local community representatives and, in some cases, students.

based on a thorough analysis of their performance, design strategies to improve their performance in these areas, and use resources to pursue their plans for improvement;

- o a staff performance management program that incorporates professional development with performance appraisal;
- o an organisational structure based on the broad functions that have to be carried out for a school to achieve its purposes rather than the established interests of individual departments or units within the school.

Central Office did not insist that the project schools embrace this concept of corporate management, but it encouraged them to keep on that track in a number of ways.

Firstly, as mentioned earlier, Central Office employed an external management consultant to present the schools with a corporate planning framework for conceptualising the kind of changes that might improve organisational effectiveness.

Secondly, Central Office made the project consultant available to facilitate school development sessions concerned with corporate structures that service the needs of students. These sessions involved asking questions about the roles of middle management in schools and exploring the notion of different roles which would take them beyond administration related to a subject area to management of a program across the school.

Thirdly, Central Office responded with more enthusiasm to proposals and innovations which were consistent with corporate management than to those that were not. For example, the proposals by three schools to set up a personal goal-setting program for students received a warm response from the external and Central Office project consultants. The processes within these personal development programs correspond to the processes of corporate planning at an organisational level - that is, setting goals, priorities, indicators of attainment, action plans, a progress log, and so on.

Table 2 lists the changes planned by the project schools that did not need Central Office approval but which were considered to represent challenges to internal rules. Even though two thirds of these changes were implemented, only the initiatives relating to school decision-making groups, school development plans, and recording student attendance were proposed by more than one school. Also, most of the other proposals amounted to fine tuning or tinkering with existing practices rather than substantial reform in the direction of corporate management.

The remainder of this chapter outlines some of the difficulties faced by schools which tried to meaningfully embrace a corporate management approach. Apart from the project consultant's report (Appendix One), not much documentary material on the matter could be found. Also, time constraints placed on the review allowed limited information to be gained from interviews. For those reasons, the following account samples only a few factors from a presumably wider range of influences that operated throughout the project.

Cultural Lag

Some project schools established their school decision-making groups and school development plans so quickly that they may have constituted only a change in structure, not culture. According to the project consultant:

"Complex issues such as decision making in a school are not amenable to the kind of solution that devises a structure. It is much simpler to legislate for a certain structure than review attitudes and change the way people relate to each other, yet these are both required for real change"
(Appendix One).

The project consultant also pointed out that some project schools operated within a system where, traditionally, policies or documented

Table 2: Proposals Challenging the 'Internal Rules' That Govern Schools

Changes planned and implemented by some schools	Changes planned by some schools but not implemented
<ol style="list-style-type: none"> 1. Establishing a school decision making group. 2. Formulating a school development plan. 3. Setting up a separate class for disruptive Year 8 students. 4. Devising more efficient ways to record student attendance. 5. Reducing the number of staff on duty roster from 29 to 9 each day by adjusting the timetable, duty areas, detention system and bike park security. 6. Replacing the Year system of organising students with a structure based on a house system and vertical forms. 7. Re-organising staff development days. 8. Allowing teachers to leave the school during DOTT time. 9. Conducting a personal goal-setting program for students. 10. Reorganising the school around 4 task-oriented, self-determining teams of teachers. 11. Installing telephones in staff studies. 12. Re-scheduling tandem teachers. 13. Producing of school ethos brochure. 14. Inservicing Year 7 teachers at a local senior high school. 15. Computerising teachers' programs in primary school. 16. Establishing an administrative structure based on a corporate rather than bureaucratic model (in one school). 17. Conducting an extensive professional development program for the school's middle managers. 	<ol style="list-style-type: none"> 1. Having the senior teacher of a small department take responsibility for teachers with no head of department. 2. Splitting the senior teacher role into two positions - one for professional development and the other for administration. 3. Rationalizing blocks of buildings (an upper school and several lower school blocks). 4. Setting up a scheme to cater for the deeper professional development needs of teachers. 5. Relieving teachers of clerical and routine administrative duties. 6. Conducting a personal goal-setting program for students. 7. Re-organising Upper School. 8. Establishing an administrative structure based on a corporate rather than bureaucratic model (in several schools).

plans were regarded as not related to everyday practice. Instead they were seen as tasks to be done, and completed once written down. The idea that development plans might be continually called upon to question everyday operations was an unnerving experience for some schools. The tendency was to use them as confirmation of current practice rather than as instruments for improving school life.

Vested Interests

During the early stages of the project, the seven schools concentrated on their school development plans. Later on some of them, with assistance from the project consultant, undertook a major review of their administrative structures. These reviews involved finding answers to questions such as: What is the purpose of the school? What functions are entailed in carrying out that purpose? What roles have to be performed to fulfil those functions? A number of schools responded to these questions by proposing a broad structure in which the existing role of some middle managers is replaced with managers of curriculum, administration and student services.

During the life of the project, only the District High School went beyond the review and planning stage to actually implement a significantly new administrative structure, though since then several schools have placed the matter back on their agendas. Apart from the 1989 industrial dispute, vested interests largely explain why the proposals were not implemented. Apparently, some deputies and senior teachers saw administrative restructuring as a threat to their interests.² Several principals explained:

² "And the Union! They were aware of our proposal for a new structure and covertly fed in their reservations about it at the teacher level" (School Principal).

"When I asked for volunteers, four or five senior teachers came forward and I naively thought, 'Great, they're prepared to review their role.' But it soon became clear they felt threatened. They were prepared to talk but ended up giving excuses why we shouldn't change and why the present structure is as good as you can get."

"We formulated a new organisation chart, a new administrative structure that would enable the middle management in the school to service the teachers so they could service the students. But there were a lot of rumours at the time that the Ministry wanted to remove senior teachers, so several senior teachers got cold feet and knocked it (new structure) on the head. Also the roles (in the new structure) were not clearly elaborated as far as the staff could see and they thought the four managers would take work off the senior teachers and make them redundant. That fed the rumours and was enough to kill the whole proposal. We'll wait now to see what the Ministry and Union come up with as a job description for senior teachers. I hope they set loose parameters so that we have flexibility."

In addition to the broad structural change required by the corporate model, several smaller proposals emerged during the administrative reviews. For example, it was agreed in principle at one school that senior teachers of small departments should take responsibility for teachers who had no head of department. However, according to the principal, when it came down to individuals, the senior teachers of the small departments said,

"I'm only paid to be the senior teacher of the (...) department, not other departments."

Evidently restructuring secondary school administrative systems on the corporate model involves challenging the established power base of subject departments and combatting the vested interests of incumbent middle managers. It also involves counteracting the influence of subject-centred universities, teacher training institutions, tertiary entrance examination structures, subject consultants, and subject associations. 'Self determination' might give schools the opportunity to break with tradition and shake off a subject-based organisation, but it does not guarantee such an outcome. For example, despite being relatively independent of the

Ministry, many private secondary schools have a subject-based administrative structure similar to that of government schools.

Safety-seeking, Conservatism and Inertia

As the following examples illustrate, a variety of proposals challenging established school practices fell on the stony ground of managerial safety-seeking, professional conservatism, and occupational inertia.

In the view of one Central Office observer, even though most schools worked with the project consultant to review their system of administration, the outcome was that:

"Principals and senior staff seemed reluctant to generate proposals which would give them a very different management role while they were not confident that they would be up to the job - a case of, 'better to stay roughly with the current role that you know you could handle'."

One of the project's objectives was to explore ways of reducing the workload of teachers and removing non-professional tasks that cluttered up their role. For many teachers, that objective represented an attractive proposition. However, achieving it proved quite elusive. Several principals pointed out that:

"Teachers hate yard duty. They have whinge sessions about it. But when we gave them the opportunity to opt out, they voted against reducing yard duty because they said they need to be out supervising."

'Only one thing came out of it - a review of the attendance system. It has now been computerised and is working reasonably well, marginally better than the old system. I was disappointed that that was the only administrative task we could suggest to reduce teachers' administrative duties. But when we put it to teachers they couldn't come up with alternative ways except to say someone else should do it - for example, the year coordinators or the deputies or the clerical assistants - rather than asking (a) does the task need to be done at all, and (b) if someone has to do it - how can it be done more efficiently. We didn't get much out of it of practical benefit. In theory none of us thought teachers should do photocopying. We thought others, for example parents, should do it. But when we put it to staff they didn't mind photocopying because it was easier in the long run for them to do it themselves."

One school set up a committee to investigate how it could help staff meet their deeper professional development needs. For example, the committee considered ways for teachers to spend a term in a bank or exchange jobs for a year with a tertiary education lecturer. According to the principal:

"The committee tended to get bogged down. We just couldn't see how we could arrange what was proposed. Maybe teachers are practical people who find it difficult to think how to do things differently."

Of the three schools that proposed a personal goal setting program for students, two implemented it - one successfully, the other less successfully (see Appendix Two). In the third school, the program

"never got off the ground because a key staff member got seconded to a teaching commitment and no one else was prepared to give it the drive and impetus required."

Shortage of Capital

As part of the project, a senior high school conducted a functional review of its school buildings, which consisted of: a series of lower school blocks built on a faculty design and an upper school block for maths, social studies, science and English. Within each block there were separate subject-based staff offices. As a result, the English staff, for example, were split into two groups - one group housed in an English office in the upper school block and one group housed in an office in the lower school English block. It was divisive not just physically, but also professionally. The same applied in the case of social studies, science and mathematics. All members of the functional review committee agreed that, to be more effectively used, the buildings had to be reorganised with the upper school block being allocated to one subject area. Several obstacles prevented the proposal becoming a reality: the upper school block was seen to be the most prestigious one and all faculties wanted

it; the two sets of science room were specialist in nature and a huge capital expenditure was required to relocate them in one area; and further extensive capital outlays were needed to expand some rooms and refurnish them.

Closing Comments

"In this chapter it looks like you're saying the project failed because the schools did not change to fit the corporate model. It came out in the end that people had failed. But we shouldn't expect instant success."

On the last point, the principal who made these comments is right. Research suggests that 3-5 years are required for meaningful change to be achieved in schools. So does the experience of a project school, whose principal said:

"We found it takes two years to make a long term decision and 5-6 years for changes in student behaviour to occur. On this basis, principals in a school for a short time can only exercise transactional, not transformational, leadership."

These observations are particularly applicable when schools try to restructure themselves along corporate management lines. Apart from the factors referred to in this chapter, resistance is often mounted by teachers who believe that the language, concepts and ideology of the corporate model are entirely inappropriate to education.

On the issue of vested interests, several principals intimated that a project like *Managing Change in Schools* would have a better chance of success if it were conducted in a brand new school. As principals of long established schools, they had found it "hard to get away from existing structures and fettered thinking." So,

"Why not put these things (the project proposals) in a new school, quarantine it, and place a sunset clause on it if need be?"

CHAPTER FIVE

IMPLICATIONS FOR THE SCHOOL AS THE PRIMARY UNIT OF CHANGE

So far the review of the project has focused on barriers to removing rules which prevent schools from becoming self-determining. It is now possible to ask - from the viewpoints of corporate management and the school as the primary unit of change, how many of those barriers can be lifted and what would be the implications of doing so?

Industrial Constraints

"One of the problems of the project was that so much of what happens is not controlled by regulations but by the translation of them. Some rules are not rules. Some matters are decided by Employer and Union agreements, not school and Ministry regulations" (Teachers Union Leader).

Up till now, the Teachers Union has insisted on a number of industrial principles that limit the school's capacity to function fully as the primary agent of change. One is that teachers are entitled to relatively fixed award conditions. Another is that the Ministry, not the school, is the employer. Those principles are unlikely to be revoked in the immediate future.¹ However, retaining them does not rule out the possibility of introducing greater flexibility for schools to make decisions at the workplace level on matters concerned with staff profiles and deployment.

¹ Though, moves seem to be afoot elsewhere. In a recent newspaper article, the New South Wales Minister of Education is reported as saying it was inevitable "that enterprise agreements - in which staff negotiated their working conditions and salaries with their bosses - would eventually spread to schools" (The West Australian 4 February 1991, page 4).

For example, in South Australia an agreement between the Minister of Education and the Institute of Teachers gave schools the option of converting "three key teachers for a coordinator or vice versa; or two coordinators for an assistant principal" (Education Department of South Australia 1989:7). That flexibility could be extended to the mix of teaching and support staff. To do so would require a change in the traditional view that teachers are the only adults in schools who perform meaningful roles with students. According to that view, teachers' complaints about increased non-teaching workloads should be responded to by increasing teaching staff establishments - even in situations where non-teaching staff could address the problem more effectively. A case in point occurred last year (1990) when the Ministry allocated large senior high schools a third Deputy Principal position. Some project school principals questioned that move. One, who was a member of the Teachers Union Executive, said:

"I led the view (on the Union) that we need more clerical workers, not three deputy principals. Because of salary differences, we can get three clericals for one deputy. It takes one and a half clericals to do the clerical component of the two deputies' work and if that happened two deputies would be able to manage. So schools would be better off with two deputies and three clericals rather than just three deputies. The counter argument put by some Union leaders was that because of the flattening out of promotional positions there was pressure on the Teachers Union to increase promotional positions within the system and that it was up to the CSA to press for more clericals. But it is really better for teachers to have less deputies and more clericals."²

² Another senior high school principal said: "The Deputy Principals Association policy was for more clerical support rather than an extra deputy in schools. It was the Teachers Union that pushed for the third deputy position."

Legal Constraints

A corporate management approach to education does not necessarily mean lifting legal requirements in relation to the way schools operate. It may mean, however, devolution of legal responsibility. A key question here is - if the school is to become the key decision-making unit and the primary unit of change within the education system, should it also become the primary unit of legal liability for the decisions it takes?

Bureaucratic Constraints

Beare, Caldwell and Millikan point out that the application of corporate management techniques to the administration of state education systems has led to the replacement of a divisional structure in Central Office by a functional structure. They claim that the new design:

- o forces the central administration into a servicing (rather than controlling) mode
- o emphasises collegiality (cooperation among professional equals) rather than hierarchy (obeying what your superior tells you)
- o replaces paternalism (where a superior does all the work and thinking for you) with diversity (that is, allowing individual schools to take initiatives which will make them different from each other)
- o forces principals and schools to behave autonomously and entrepreneurially (that is, to take a fair degree of responsibility for their own destinies).

By its very nature, they say, the functional design "forces schools to be more self-determining and the central administration to be less custodial and protective" (1989:82).

Beare, Caldwell and Millikan also point out that new corporate management structures have a very much reduced role for the middle managers. In the past the middle manager was a communication link between

the work units and top management, which gave them the power to filter "enthusiasm, ideas and initiative from below." Since the work units are relatively autonomous within a corporate structure, "there is less need for the supervision which middle management once provided; instead the units survive or flourish according to whether they can deliver a quality service" (1989:76).

The experience of schools in the project would suggest that, despite the restructuring of 1986-7, Central Office has not gone all the way down the corporate management track. Nor it is likely, within a system of self-determining schools, that the bureaucratic restrictions which frustrated some of the project schools can be lifted in their entirety. More generally, according to one Ministry officer:

"In the future there will still be a need to establish policy parameters, review policy and monitor both the quality of education and school compliance with policy. It is reasonable to assume that these will remain central functions. The advantages of maintaining these functions centrally are that duplication of workload is avoided and that schools receive a consistent message about the Government's expectations. It is therefore reasonable to assume that a Central Office and the role of an educational auditor (currently performed by District Superintendents) will continue in the future."

Ideological Constraints

Beare, Caldwell and Millikan maintain that the glue which holds a "radically decentralised atomised organisation" together is the corporate culture. In their view it is the task of senior Central Office personnel "to manage the organisation's beliefs and values, its purposes and its conceptions of self - in short, its culture" (1989:77). Although being the primary unit of change, a self-determining school needs to make decisions within the framework of the corporate culture - it can not have unconditional autonomy.

If some core values are non negotiable, however, self-determining schools need to know what they are. The dominant ideology in Central Office prior to the Better Schools Report was multi-faceted. The project's promoters clearly hoped the seven schools would challenge those facets which justified the bureaucratisation and centralisation of power, authority, administration, management, responsibility and accountability. How many other facets they wanted challenged is unclear. Equally uncertain was the number of other facets that remained intact. For example, did the 1987 reorganisation, which in some cases removed departments concerned with multicultural education, Aboriginal education, equal opportunity, special education and gifted education, mean that the policies previously attached to those areas no longer applied? In the absence of a clearly articulated corporate culture, the school's capacity for self-determination is likely to be constrained not by the ideology of the organisation but by the ideologies of powerful individuals and groups within it.

Economic Constraints

If the economic constraints imposed on the project schools were lifted across the board, there would be a massive budgetary blow out - so that simply will not happen. Instead, within a system of self-determining schools, all schools are entitled to a fair share of resources and no more. Having received a cash grant they are responsible for their own economic salvation. That means, financing their own maintenance and development programs rather than expecting in-house innovations to be funded from Central Office 'top ups'.

Given those restrictions, schools are entitled to make decisions that give them maximum value for their money. In return for being constrained by a fixed level of resource allocation, they need maximum discretion over the distribution of those resources.

APPENDIX ONETHE PROJECT CONSULTANT'S REPORT

As part of his report on activities in 1988, the Central Office project consultant made an analysis of the schools' response to the project. Most of it is reproduced below.

Response of Schools to the Project

The way schools reacted to the project is symptomatic of broader issues which are unresolved in the system at present. The intervention strategies the project adopts in 1989 will need to recognize and contribute to the resolution of these tensions.

1. A sense of waiting for some clearer direction from the Central Office.

From one point of view this is understandable when there is a shift away from a centrally dominated system where initiatives came from the Head Office and schools simply did as they were told. In that scenario schools were dependent on someone telling them what they could and couldn't do and the emphasis was on not making mistakes. If school communities are being given more opportunity now to set their own directions, they will naturally want to know if they have 'got it right' which traditionally has meant pleasing your masters in Head Office. Hence much watching and waiting to see just what it is that pleases the new regime, picking up clues from wherever you can about the 'right' thing to be doing now. This posture also has the effect of putting those in powerful positions in a neat double bind: any issuing of clear instructions to schools can be seen as a lack of faith in the capacity of the schools to be self-determining; failure to issue them can be taken as lack of commitment to any clear direction and tacit approval of continued waiting.

The project has dealt with this by helping schools to think through what changes would improve the educational offering and then encourage them to take a risk and do it, always being willing to be held accountable for the decisions made. The immediate problem one runs into is that traditionally mistakes have been punished and the mentality developed that it is better to do nothing and thereby make no mistakes than act and risk getting it wrong. We need to develop (in a scenario of self-determining schools) compassion for mistakes both within the school and from outsiders to the school as well as a willingness to take initiatives.

2. Lack of conceptual clarity about the "Better Schools" reforms amongst school staffs.

There seems to have been little opportunity to discuss and clarify such questions as:

What do we mean by a self-determining school? Who is responsible for what? What is the District Office for? What should schools be held accountable for?

Until there is a clear understanding of these things it makes little sense to ask schools to show some initiative and get on with it. "Get on with what?" they will ask. There is a world of difference between telling people what to do and clarifying the intentions of the reforms.

The project has therefore consciously adopted an educational focus, describing the rationale for the reforms, their meaning, their potential for improving the schools, and in doing so building commitment to them.

3. The tendency in schools to view solutions as more of the existing medicine.

Repeatedly in the project as problems were identified the answers proposed were unavoidably along the lines of doing more of what they were already doing. For example, if teachers' workload is excessive then the solution is more teachers; if deputy principals are snowed under with routine administrative tasks to the point where they can't get to the important professional work, then create a third deputy position.

Such thinking flies in the face of a basic organisational principle: that problems always expand to exceed the resources allocated to solve them. Encouraging schools to think not only about what they are doing but also about whether they should actually be doing that is an important aspect of the project's strategy.

4. The bureaucratic tendency to abdicate responsibility for solving problems.

The system has allowed and in fact reinforced people for shifting responsibility to others for solving their problems. The notion of self-determining behaviour is working against this aspect of the culture by insisting on more local decision making and the acceptance of the responsibility that goes with it.

During 1988 the project allowed schools to direct their energy at external factors such as Central Office rules that constrain the school. Over the year schools discovered that the really significant targets for change were within the schools rather than elsewhere. The critical shift in attitude is from "it's up to them" to "it's up to us." That is the beginning of accountability.

5. Schools have looked for structural solutions to problems that require attitudinal and behavioural change.

Complex issues such as decision making in a school are not amenable to the kind of solution that devises a structure. It is much simpler to legislate for a certain structure than reviewing attitudes and changing the way people relate to each other, yet these are both required for real change.

6. Schools have difficulty in using consultants appropriately.

When key questions were being confronted (such as a review of organisational structure) and consultancy support offered, the tendency was to try and locate "an expert" who could give advice on that subject. Schools have been trained to think of consultants as people who know more about the particular issue under consideration than those in the school, rather than someone who has a different kind of expertise that can combine with the school to generate solutions. Consultants in the District and Central Office frequently confirm the schools' view by behaving in precisely the way schools expect.

The project has endeavoured to model and teach the usefulness of a consultant who can assist in developing the problem solving capacity of the school. This is fundamental to the notion of a self-determining school.

7. The well established tradition that policies or documented plans are not related to everyday practice.

The establishment of school objectives, for instance, was seen as a task to be done which was completed once they had been written down. That these objectives might then be used to question everyday school practices was an unnerving experience for some schools. The tendency was to use the objectives as confirmation of current practice rather than as an instrument to change what was happening.

The success of the notion of a school development plan depends on establishing this link. Because schools are clearly unused to using planning documents in this way, the danger is that school development plans will be relegated to the status of yet another task to do, i.e. increased workload, rather than a powerful vehicle for improving school life.

8. Resentment that "the rules" regarding teaching had been changed.

The feeling in most schools in the project was that teaching had become extraordinarily and unnecessarily complex. It used to be possible, teachers reported, to be left alone most of the time in your classroom to get on and teach. While that was not always easy (because students are not always amenable), nor always satisfying (because of the isolation), nor indeed very motivating (because it is hard to know how well you are performing), at least it was clear what was expected of you.

Teaching is no longer like that. There is now an expectation that teachers will attend meetings of various kinds on how to improve the school, participate in decision making that was previously the province of the principal or the Central Office, write their own curriculum, involve the community, and all this showing no signs of abating.

The very real danger in all of this is that the changes could become disconnected from the real concerns of teachers. The project has tried to attend to this difficulty by directly linking wherever possible the reforms to the problems teachers see as needing to be addressed.

The message in all of this is that those implementing the changes need to see them as solving problems rather than giving them a problem. We found frequently that teachers did not understand what the problem was that the reforms were solving; it therefore made no sense to them and simply created more work. The solution that has worked so well in the past for teachers who are unconvinced about the need for change was emerging again: if you wait long enough the pendulum will swing back and all the consultants will go away.

9. Suspicion and fear about how the notion of accountability is going to be applied to schools.

While there was a general understanding and acceptance of the audit function of the District Superintendent there is an understandable concern that a 'catch out' mentality will drive the implementation rather than a management approach. Schools in the project are being encouraged to put in place management information systems which will allow outsiders to quickly see how the schools is performing, whether barriers to improvement have been identified, and what action plans have been developed to overcome these and raise performance.

The project has aimed to support schools in being proactive by developing their own systems for monitoring and improving performance rather than waiting to see how the concept of accountability is to be applied to them.

10. A feeling of abandonment as familiar support services have been withdrawn.

While schools feel they are now expected to do more, they see a reduction in the level of support to help them get it done. Although the function of the district structure is to provide such support there seems to be a feeling in the schools that the district personnel are owned by the Ministry rather than the schools; they do the Ministry's bidding rather than the jobs the schools want doing. If that is the case then it is a serious criticism because in a period of devolved authority there will be a clear need for the schools to be provided with the human resources to handle the work associated with the exercise of that authority.

A key issue that this raises is how the consultants in District Offices see their role. The project has attempted in some cases to establish the District Office consultants as available to assist the school with tasks thrown up by their involvement in the project. This has not been easy to establish and requires further work in 1989.

The whole question of support for schools is complex, but the project is working from the conviction that, in a self-determining school scenario, support needs to be conceived as: (a) enhanced internal resourcefulness, i.e. schools need to learn to mobilize their own problem solving capacity rather than expect to refer problems to outsiders for solving; (b) provision of consultancy of the collaborative problem solving sort that works from the assumption of simply adding some expertise to that already residing in the school rather than taking responsibility for solving the problem away from the school; (c) provision of the person-power to assist with the workload involved in accepting the authority devolved from the Central Office.

11. Sense of powerlessness amongst teachers in terms of their capacity to influence the direction of education in their school and the wider system.

From the beginning of the project there was a strong perception in the schools that the consultation being offered was tokenism; that essentially the exercise was Central Office fishing for already decided upon solutions. There was a great deal of second guessing about what was in the minds of those in the Central Office. Convincing schools that in this project the outcomes were not pre-empted was difficult but essential to school ownership of the outcomes. A great deal of time and energy went into establishing a baseline of credibility and trust so that the project could tap the combined wisdom of school personnel.

APPENDIX TWO

SOME PROPOSALS WHICH WERE APPROVED AND IMPLEMENTED

This appendix documents the type of reforms which the seven schools introduced as a result of the project. It outlines the range of changes made, rather than every proposal approved. Also, while most of the tangible reforms generated by the project are recorded, the account does not identify the intangible benefits obtained by the seven participating schools. It may seem that some of the proposals could have been formulated without a project. However, the schools developed them within the framework of the project, without which they may have remained dormant.¹

CHALLENGES TO THE EXTERNAL RULES

The Provision of Teacher Relief Time

Several schools proposed changes to the system of 'teacher reliefs.' They wanted flexibility and control in four areas: 'booking up' relief days; having immediate (one day) reliefs; paying teachers for after-hours work; and paying school staff to take reliefs for absent colleagues. As explained by the schools, the rationale underlying these proposals included these points:

¹ "Tricky! They were formulated within that framework but it is to be noted that school districts were already running SDP seminars and in particular presenting some of the models used in planning, especially in PSP schools" (School Principal).

"Schools require some flexibility in arranging when they may take up relief teaching days due to them. There are good reasons why a school may not wish to use a relief teacher on the day of a teacher's absence. Sometimes, the absent teacher may only have a couple of teaching periods on the day he/she is absent. Again, if a deputy principal is away for a week, the relief teacher is best used on the deputy's return so they can be directed to deal with the backlog. In both these cases, and in many other cases, the school needs the flexibility to 'book up' the relief days so they can be at a more appropriate time, more suited to the school's needs.

Current Ministry policy does not provide relief if a teacher is absent for one day only. This leads to a situation where a teacher takes more than one day's sick leave when only one day is necessary in order to protect colleagues from the extra workload of having to cover for them for a one-day absence. This Central Office rule leads to wastage which would be lessened if schools were given the authority to decide when to involve a relief teacher and if it was permissible to use a relief for a one day absence.

If in-service programs, official meetings and the like are held during school time, relief provision results in: loss of class contact time and extra work (setting, marking and re-presenting work) for the teacher being 'relieved'; and general disruption of the learning programs during the day. Therefore schools should have the flexibility to conduct meetings and projects after school hours and pay teachers, from 'relief' funds, to attend. This arrangement would not require extra expenditure by the Ministry.

The use of relief teachers generally upsets the smooth running of the school. Minimizing the use of outside staff is in the best interests of the students. Therefore, schools should be allowed to use the existing staff to provide cover for absent colleagues, and pay them from the teacher relief allocation. Such a plan would allow continuity of the teaching program by staff known to the students and familiar with the subject/program. A rate of pay per period would need to be determined. Provision of a relief budget to the school may address all these issues. Such a budget should be fairly based on past experience and allow for savings to carry over from one year to the next."

Initially Central Office approved these proposals on a trial basis. Since then, it has changed the regulations to allow all schools to take advantage of them.

Handyperson

Central Office approved the proposal from one school to appoint a handyperson. The duties for this position included: doing minor

repair and maintenance work such as fixing leaking taps, flickering fluorescents, broken windows, and damaged lockers; helping in the manual arts and art areas by sharpening chisels, cutting out material for student work, and re-treating clay; and assisting the registrar by maintaining the faults register, replacing toner in photocopiers, delivering stock, and finding keys. The Miscellaneous Workers Union contributed positively to discussions on the job specification, work conditions, and monitoring of the new position.²

The trial school kept a log of all jobs carried out by the handyman. A recent analysis of the log showed that the scheme has saved the Government money because the handyman completed many jobs previously done by the Building Management Authority (BMA) and other contractors. Furthermore, according to the principal of the trial school, the handyman initiative has removed long delays for BMA maintenance, given the school a cleaner smarter look, enhanced teacher morale, and enabled staff to spend more time on professional tasks by releasing them from non-teaching duties.

Budgetary Autonomy

Two senior high schools in the project requested permission to set up a budget that would operate as a separate cost centre. One did not follow through with the proposal so it lapsed. The other school persisted and was given the opportunity to take responsibility for a large part of school finance. That meant controlling its own expenditure on things such as: kilometrage; telephone and postal charges; minor constructions

² "We failed in our original intention, to have flexible use of ancillary staff. The handyman was an add on, an extra person" (School Principal).

and school stocks; recoups for biological and general science; seed and fertilizer; electricity, gas and water; purchase and maintenance of equipment and apparatus; and grants and advances.

To cover these items, Central Office established the budget from an analysis of current expenditure, sent a cheque to the schools twice a year, gave the school full control over these funds, and helped in other ways, such as: providing a safety net to protect the school against any unrealistic figures; giving the school flexibility to adjust its expenditure priorities during the year within its overall budget allocation; making quarterly reports to the school on the progress of expenditure; and reminding the school that all receipts and investment of school administered grants had to be in accordance with the Finance, Administration and Audit Act (1985).

On hearing about this proposal, the leadership of SSTUWA wrote to Central Office expressing concern about possible wide ranging industrial implications. In reply, Central Office explained that:

"We are augmenting the grant to (.....) Senior High School with a view to finding out by experience the sorts of things that we may have to put in place if we are to move into the school grant phase of Better Schools implementation. There may well be industrial implications arising out of this but we consider the only way to find this out is to do it on an experimental basis during which all parties concerned, including the Union, can keep a close eye on what is being done and what is being proposed. The school grant itself cannot be implemented at this time because we do not as yet have the legislative backing to do so but should this become a reality you will be fully informed and consulted before the proposal is put into effect."

Obtaining Prior Consent of District Superintendents

Regulations require schools to gain permission from the District Superintendent before conducting student activities involving an overnight

stay. A month's notice is required in all cases.³ One school successfully sought exemption from this regulation so that it could authorize camps for students without the hassle of obtaining external approval.⁴ It was also successful in seeking exemption from a regulation which required schools to notify the District Superintendent before suspending students.⁵ The proposal argued that:

"The authority to suspend students must lie with the school. The current need to notify the District Superintendent should be replaced via a system of an annual report."

Nine Day Fortnight and Longer School Days

Another school sought approval to investigate the possibility of instituting a nine day fortnight and varying the school day. It had recently set up a personal goal-setting program for students which involved extensive use of community resources. The nine day fortnight was seen as a way of enabling students to participate in more community activities without loss of tuition time. Also, teacher stress had increased at an alarming rate over the past few years and the school considered the nine day fortnight would significantly reduce that problem. The same school requested funds to investigate the feasibility of staying open for a longer period of the day. It did so in response to

³ "I've never had an application knocked back even when I've taken it down on the day of the camp" (School Principal).

⁴ "The (Teachers) Union view was that schools were not covered by what happened to children or property. In a couple of famous cases, one in Victoria and one in W.A., even where teachers had permission they were found to be negligent on issues related to duty of care. The Ministry wouldn't accept vicarious liability" (Teachers Union Leader).

⁵ "If it is a regulation, then I've been operating outside it for years" (School Principal).

an increasing proportion of upper school students participating in part time work and other members of the community seeking to attend school part-time. To accommodate these trends, it wanted to offer late afternoon and night classes covering CSE/TEE (Certificate of Secondary Education/Tertiary Entrance Examination) courses. Central Office supported both investigations.⁶

Commercial Curriculum Packaging

A proposal for the packaging of primary curriculum resources met with success. The school asked Central Office to liaise with other government agencies and lobby commercial enterprise on the production of support material for teachers and school syllabuses. It also recommended that Central Office compile a register of teachers in schools who could be used as consultants in the preparation of these packages.⁷ In reply, Central Office said:

⁶ "We ran up against a brickwall with the Union. Our teachers are still keen to look at more flexible hours to make better use of the facilities. For example, we have a limited number of computers and only one photography room. Flexible hours would allow greater use of those limited facilities" (the principal of another school to the one that submitted the proposals).

⁷ "This proposal raises the issue of copyright. Under the Act, anything produced in schools becomes the property of the Ministry. There is the issue of who owns intellectual property. If teachers work on a package at home, then why should the Ministry have copyright? The Union believed the Ministry should draw up a legal contract with teachers but it never got past a series of principles. There is also an ideological problem here about whether materials should be sent off shore - because nothing is produced centrally now - and whether schools will be exploited by private profiteers and the commercial interests of the USA if the production of curriculum materials falls into the market" (Teachers Union Leader).

"I don't think this proposal went further" (School Principal).

"Your proposal was forwarded to the Curriculum Services Branch and has been received very positively. It has been assumed that in making the proposal your school would be keen to participate in a brief reviewing of materials prepared. If this is not the case could this be communicated to the project team. In due course officers of the Curriculum Services Branch will be in contact with the school to involve staff in the consultation."

Specialist Advisory Assistance - Speech and Motor Coordination

An integral part of the primary school in the project was an on site Education Support Centre. One of its proposals aimed to improve the quality of assistance given to children with speech and motor coordination problems. Several strategies were advocated.

Firstly, teacher relief time was sought to allow staff to attend inservice courses, confer with specialists and examine existing specialist programs. The Ministry informed the school that these needs should be met within existing arrangements for the school's staff development program.

Secondly, the school sought access to occupational and speech therapists and university gymnastic professionals. A further element involved the use of the school as a base for long term practice students from the Curtin University Occupational Therapy Department. The Ministry saw these initiatives as having system-wide implications and supported them by providing a total of eight days teacher relief. The school regarded the Ministry's responses as not addressing "the issue of school access to therapists in school time for children needing therapy but not registered with AIH." It resolved to submit new proposals to the Ministry,

"stressing the need for equity of service and adjustment to the weighting of school development grants in favour of schools with special needs, that is schools with Education Support Centres."

CHALLENGES TO THE INTERNAL RULES

The project schools made more progress towards self-determination by concentrating on practices within their own control than they did by focussing on the external barriers to devolution. Apart from changes to the teacher relief system and raising the profile of corporate sponsorship, challenging Ministry regulations proved unfruitful. By contrast, tackling internal constraints produced school councils, school development plans, a 'house system' and vertical forms, a goal-setting program for students, and a sub-school organisational structure. According to the Ministry consultant, what seemed to happen at the beginning was that the project allowed schools to direct their energy at Central Office rules that limit local autonomy. As the year progressed, however, some schools discovered that the really significant targets for change were in their own backyard rather than elsewhere. For them, the crucial shift in attitude was from "it's up to them" to "it's up to us" (see Appendix One).

Ironically, the project schools' work on internal reform had more influence on system-wide change than did their efforts to remove external barriers. Following the release of the Better Schools Report, all schools were supposed to proceed with self-determination, but there was no suitably produced policy in the areas of school development planning and school decision making. The Ministry had access to a number of blueprints such as the Collaborative School Management Cycle of Caldwell and Spinks. However, these models were developed outside the state. To impose them on local schools would be seen as contrary to the spirit of self-determination. That is, Central Office had to be seen practising what the Better Schools Report was preaching. It had to adopt a process which would enable a representative group of stakeholders to participate in

formulating policy. Halfway through 1988, the Ministry gave the project consultant the job of producing guidelines on school decision making groups and school development planning. In discharging that responsibility he was able to use the project schools as a laboratory for deriving and testing draft policies that could be sent to other schools for feedback before their eventual adoption as official guidelines.

The significance of the proposals which were listed in Table 2 as planned and implemented has to be tempered in the light of several considerations. Only the initiatives relating to school decision making groups, school development plans, and recording student attendance were proposed by more than one school. Also, most of the other proposals amounted to fine tuning or tinkering with existing practices rather than substantial reform. On the other hand, a Central Office observer made the comment that:

"With this type of project it is easy to expect that the vision of a very different kind of school system could be jumped to, that the project schools would want to be at the end point of the changes when in fact they only wanted to take one step. It is important to reinforce that step rather than be disappointed that more ambitious proposals for change were not generated."

School Decision-Making Groups

The project acted as a catalyst for most of the schools to establish school decision-making groups consisting of staff, student, and parent representatives. These groups wrote constitutions, worked on school development plans, and provided their schools with a broad base of policy advice. In doing so, the project schools promoted the type of community participation and self-determination recommended in the Better Schools Report some two years ahead of other schools. They would have done this eventually anyway, but as one project school principal said:

"The project gave some whole school endorsement to the exercise and made it seem that we set up the Council because we decided to and not because it was imposed from outside."

Or, in the words of one staff member,

"The principal was keen in 1988 to set up a school council and the project provided the basis to launch it. It got going despite the industrial conflict and the lack of clear direction from Head Office."

Because the project schools set up their councils before the Ministry had written policy and guidelines on school decision making groups, some of them adopted a broader role than the latest amendments to the Act stipulate. As a result of experience in the project, some parents feel that schools have less capacity to be self-determining now than they believed was the case two years ago. From their perspective 'challenging the rules' had a negative effect. It produced a backlash from principals associations which successfully applied pressure on the Ministry to tighten up the system rather than free it up to enable schools to become more self determining. For example, one parent said:

"The Ministry guidelines for school councils are a back step because with the visionary concept in the Managing Change project, the feeling now is that the councils are a rubber stamp."

School Development Plans

Those schools which held an initial workshop conducted by the external consultant, were presented with a corporate planning framework as a way of conceptualising the kind of changes that improve organisational effectiveness. For two days they discussed the need for corporate objectives, performance indicators that demonstrate the school's success in achieving those objectives, programs to deliver on the indicators, an organisational structure to enhance delivery of the programs, and a management information system to monitor performance on the indicators. By the end of 1988 most of the project schools had produced an embryonic development plan. Consequently, they were well placed to make practical

sense of the Ministry's official policy booklet on school development plans when it was released in 1989.

Reducing the Workload of Teachers

A number of schools in the project found ways to reduce the workload of teachers. In one school, a small group of disruptive Year 8 students was identified, withdrawn from their normal class, and taught by a teacher appointed from within the school's resources. Although only ten students were involved, the program had a marked effect on the Year 8 classes. The same school began using parents appointed by the Parents and Citizens Association to supervise students during lunch times, but had to stop when it received advice on issues of legal responsibility. Another school calculated that it could reduce the number of staff on duty roster from 25 to 9 each day by adjusting the timetable, number of duty areas, detention system, and bike park security. Finally, several schools investigated a more efficient way to record student attendance.

House System and Vertical Form Classes

Under the banner of the project, one school reviewed the basis on which students were grouped for instruction and staff counselling. It decided that because the Unit Curriculum involved mixed Year 9 and 10 classes, grouping students into the traditional year structure was no longer relevant. Instead, it proposed a house system with vertical form classes containing students from each year group. That proposal has now been implemented and the 'year staff' have been replaced with house leaders and deputy house leaders. Apart from matching the new curriculum structure, teachers report that the house system has reduced inter-year

rivalry between pupils, reduced the number of cliques, and tied the students together. It has also provided an effective structure for pastoral care and informal peer support. The form classes are smaller (18 as compared with the previous 32) and the staff share references, the workload, and students from all years. Overall the new system⁹ is more equitable and it discourages secret deals.

Professional Development

The project gave one school the impetus to upgrade provisions for staff development. Firstly, the school established a professional development committee and a professional development coordinator as part of the school management structure. That group coordinates professional development days, surveys staff on preferred topics, is responsible for developing a yearly plan, and links up the whole school professional development program with staff development days and subject department meetings. Secondly, the school's media teacher prepared a managing student behaviour video for the professional development of its own staff and for other schools to use. Further videos are about to be made on conflict resolution and making contracts. Thirdly, the school set aside professional development funding from the school grant. According to one teacher:

"The project gave us the feeling that we could do these things. We could have done them before but we didn't."

Another school used the project to mount a professional development program of some ten sessions for its senior staff. The object was to develop a cadre of middle managers within the school who could act

⁹ "We've had a house system and vertical form classes for 15 years" (School Principal).

effectively as agents of change. The program concentrated on functions rather than tasks. It sought to develop skills and understanding in areas such as educational policy making, strategic planning, teacher accountability, monitoring student performance, delegation, problem solving, motivation, team building, staff supervision, time management, developing staff understanding and commitment, the need for restructuring, and managing change. The Ministry paid a private management development consultant to take about half of the sessions, provided the services of its own consultant to conduct the other sessions, and supplied teacher relief throughout the program.

Student Goal Setting Program

One of the performance indicators established during an initial school/community workshop, came directly from the students. When asked, "What would show that the school was doing its job?" one student said,

"If the school was helping us to achieve our personal goals I believe that it would be doing its job."

The whole group agreed, made personal goal setting an immediate priority, and set up a steering committee to review available programs. A suitable program could not be found so two staff members undertook to research and develop one in their own time. Next, the committee decided that staff development was critical, so it established an appropriate course. Volunteers from those who attended the course became leaders for the program. Further help came by training student leaders, and the community contributed financially and provided guest speakers. In this school, goal setting continues as a priority for 1991. It interrelates with and will be backed up by another priority - active learning.

Telephones in Staff Offices

As part of the broader theme of professionalism, the teachers at one school complained about the lack of telephones in staff offices. They pointed out that too much time was wasted trying to return outside calls because phones were generally inaccessible, secretarial support was limited, and there was no system for queuing calls for the phones that were available. They also felt the situation reflected a lack of trust about not abusing privileges. In response to these concerns, the school connected outside lines to staff offices thus allowing teachers greater access to phones for carrying out their duties.⁹

Tandem Teachers

One school sought permission for a change that was already within its authority to enact, namely, altering the days that tandem teachers work. The plan enabled a teacher to work five days straight - for example, Wednesday, Thursday, Friday, Monday, Tuesday (3+2), having the following 3+2 days off, and so on. As such it offered students greater program continuity and teachers the chance to participate in activities associated with school development.

School Ethos

The project prompted a school to prepare an ethos statement and

⁹ "Was this done through in-school redeployment of internal funds as suggested earlier in the report? An extension of school telephone systems was already centrally agendered. It is now near completion" (School Principal).

publish it in the form of a brochure. Three objectives lay behind this initiative:

1. To give parents an opportunity to choose a school for their children that has an established ethos which includes clearly defined objectives and performance indicators.
2. To generate a commitment of support by parents for the school and its ethos.
3. To stem the flow of students to independent schools.

As result of the brochure, the local community is now "very aware of what the school is about."

Transition of Year 7's to High School

The primary school in the project proposed that its Year 7 teachers spend two days with the subject teachers at the local senior high school in order to acquire information on the skills necessary for students to handle the transition to Year 8 more smoothly. It requested four days relief for the two Year 7 teachers and four days relief for rotating teachers in the secondary school. Central Office obliged and expressed interest in the outcome.¹⁰

Computerised Programming

The primary school also asked for four weeks of clerical assistance to computerise programs for social studies, general language, Education Support materials, and mathematics. Central Office responded by saying:

¹⁰ "We've organised this in association with feeder primary schools, without extra teacher relief, for the past 20 years. It doesn't take extra relief time so long as you have the goodwill of teachers and if it's done in December because once you lose the Year 12 students, teachers are available to run an orientation program for primary school children" (Secondary School Principal).

"Your proposal for clerical assistance to transcribe programs would appear to be a benefit to teachers in the school and as a bonus be applicable to the system. I am very keen to support any proposals that will free teachers from routine clerical tasks and so enable more time and energy to be spent on the quality of educational delivery. A clerical assistant will be available to you in the first semester to use when you have determined the order that you wish to undertake this task. Please inform the project team two weeks before you would like this assistant in your school." ¹¹

¹¹ According to the principal, "The program started with social studies and then stopped. It took longer than we allowed for and it was much more difficult putting the other subjects on computer. It seemed easier to write the program than use the computer. A faster computer would have required additional funds."

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