5
Let the Devil Choose: Frustration or Anxiety in the Wake of Performance Measurement in Universities

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Introduction

The purpose of this chapter is to discuss changes and challenges in the management of universities by using two archetypes – the ivory tower and the mass university – as an intellectual device to illustrate the nature of changes from traditional to contemporary universities.

The university is a complex organization, which may consist of many sub-cultures and disciplinary cultures. When we use the term 'university' we refer to one of the dominant sub-cultures in universities, namely the management, which likes to be identified as 'the university'. This sub-culture is, indeed, becoming increasingly important in our time of global university rankings, with international competition among higher education institutions resulting in the current focus on performance measurement and management activities.

Performance objectives should provide the means by which a university's strategy is translated into courses of action, setting out the priorities for teaching and learning, research and scholarship and the third mission. Together with the university mission they specify the tasks to be undertaken. Pressures for increased performance in relation to financial and resource allocation issues, teaching and research quality, student and other dimensions of stakeholder satisfaction, will be ever more prevalent, given increased market competition and state regulation in times of financial constraints and heightened consumer assertiveness.

Universities, as with other professional services, have, in the past, been accused of complacency – the ivory tower archetype: professors might have known better, but they were often perceived as arrogant or self-important by students and funding agencies, being detached from society. In the last decade, universities were pushed into the mass university archetype, more focused on standardized procedures and on the introduction of performance and accountability assessment mechanisms. In fact, these institutions are, currently, competing for resources, these being financial, material or human, and face an increased pressure for accountability to their funders, students and society at large. However, lately, they started to feel the need to differentiate in order to be at the top of the league tables, which became increasingly important. They have perceived that excellent universities will not only have to be good in their academic or research standards, but also in the experience they provide to students and to staff.

Dealing with increased, often contradictory, pressures is not easy. How can the experience of students and staff be improved without increasing cost? How can efficiency in terms of progression, retention and graduation rates be improved without compromising academic standards and values, and widening access policies? Performance objectives are the basis for the development of performance measurement systems and a key way of linking performance measures to strategy. However, control systems are part of a cultural web, with trade-offs between efficiency and flexibility, corresponding to either compliant or adaptive cultures. Often, universities experience a schizophrenic situation whereby they are increasingly required to be both, which generates frustration and anxiety.

Additionally, organizational control systems often lag behind what is desired to reinforce new behaviours. The phrase 'what gets measured gets managed, but what gets rewarded gets done' illustrates the current situation with teaching quality in many institutions: it gets measured and thus gets managed, but it does not get rewarded, so it does not get done. It also exemplifies how the core culture of an organization changes extremely slowly.

In this chapter, we will explore how universities are coping with the pressures to be both ivory tower and mass university.

Pressure for increased performance in universities

Many universities around the world have been operating in an environment where the public sector has been reinventing itself in the

form of what became known as 'managerialism' (Aucoin, 1990; Pollitt, 1993; Peters, 1996), 'New Public Management' (Hood, 1991), 'market-based public administration' (Lan & Rosenbloom, 1992), the 'post-bureaucratic paradigm' (Barzelay, 1992) or 'entrepreneurial government' (Osborne & Gaebler, 1992). The key features of this reinvention have been 'a focus on management, not policy, and on performance appraisal and efficiency; [...] the use of quasi-markets and contracting out to foster competition; cost cutting; and a style of management which emphasizes, amongst other things, output targets, limited-term contracts, monetary incentives and freedom to manage' (Rhodes, 1991).

Thus, universities have been subjected to several exogenous forces that reflect the changing context. Among others, there have been pressures to democratize access to higher education, to contain costs, to be accountable for the money spent, to increase productivity, to improve the quality of teaching and research, and to develop the third mission and show its impact on society. These external pressures have, in turn, led to internal ones as a reactionary consequence.

In order to address the environmental change, many universities started to rethink their traditional forms of organization, governance and management, and implemented new strategies that put an emphasis on the introduction of effective coordination and control systems, needed to improve organizational performance (Clark, 1998; Vilalta, 2001; De Boer, 2003). As a result, the university culture has increasingly moved towards a market-driven enterprise culture, largely reflecting the new management models that have spread through the public sector (Ackroyd & Ackroyd, 1999).

However, the implementation of these new strategies is far from straightforward. For example, in terms of the introduction of performance management systems, which comprise the collection, reporting and use of performance data that may be used to influence staff behaviour and to drive improvement, there is evidence that many universities spend a large amount of time and resources in measuring performance, not using the data collected and thus getting only limited value from those efforts (Melo et al., 2010; Sarrico et al., 2010).

Even though almost every management manual assumes that by having a clear strategy managers will know what initiatives to approve and to reject, customers will know what to expect, employees will know what to provide and operations will know how they have to deliver the service thus naturally leading to organizational success, in practice, that seldom happens (Jarzabkowski & Wilson, 2002; Jarzabkowski, 2003). Strategy formulation means change and that change is constrained

by both the external and internal environments. That is why it is so important to understand the endogenous and exogenous forces that are driving universities to change their missions, structures and processes and analyse how these institutions are responding to these new challenges.

From the ivory tower to the mass university and back

Throughout organizational history, a tension has been observed between quality and productivity, effectiveness and efficiency, adaptability and compliance, giving rise to what some call the classical and neo-classical organizations, the mechanistic and organic archetypes. The pressure to change from one archetype to another can lead institutions to either frustration or anxiety, depending on the change of direction (Johnston & Clark, 2008). Figure 5.1 attempts to show how those tensions occur in higher education representing two archetypes, the ivory tower and the mass university, and the often existing gap between what is promised (marketing) and aspired to, and the reality (operations) of what universities can offer.

The ivory tower

The ivory tower archetype is characterized by small numbers of students and low student-staff ratios, where students feel they are treated as
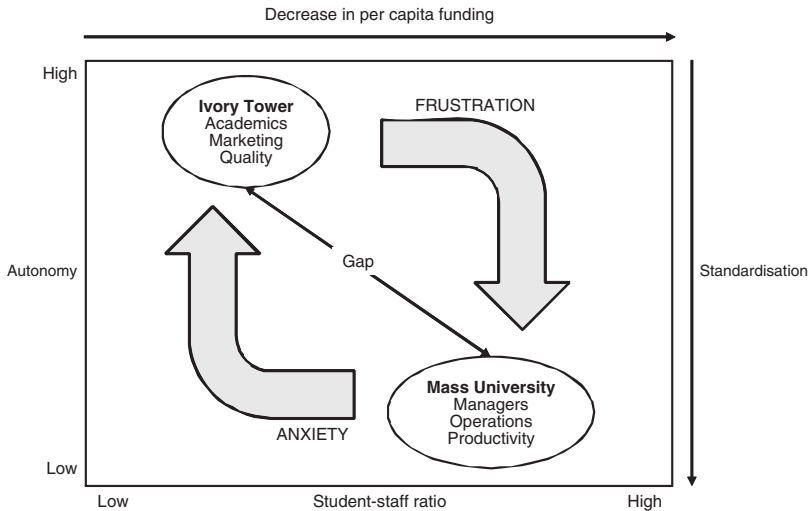

Figure 5.1   Frustration and anxiety in universities
Note: Inspired by Johnston and Clark (2008).

individuals and there is a large autonomy for academics and flexibility in the way things are done. In this type of institution, academics have high degrees of creative discretion both in teaching and research. There is often a high dependence on key professors' skills and knowledge. There is resistance to the generation of standard processes, leading to inconsistent approaches. There is an emphasis on innovation and on personal development. The management style here is likely to be collegial, focusing on getting the best out of every individual. Few processes are documented, partly because there is no consistency in the types of activity performed and partly because academics may resist what appears to be an attempt to impose controls on their autonomy.

Although for many centuries universities were ivory towers, standing aside from society, they started to feel the pressure to move towards a more commoditized type of institution, as student numbers increased and pleas for increased quality and accountability arose.

The move from the ivory tower archetype to the mass university is well documented in the higher education literature. In fact, there is a widely shared opinion among scholars that the changes that have occurred in higher education from the late 20th century onwards forced universities towards a shift in their identity. Bauer et al. (1999), for example, talk about 'transforming universities' and Amaral et al. (2003) discuss the existence of a 'managerial' revolution. As Mora (2001) puts it, '[universities] have gone from training a selected elite [the ivory tower], to educating a large proportion of the population, under what has come to be called the mass system of higher education' (see Trow [1973] for a seminal essay on the issue).

However, the transition from the ivory tower to the mass university (the lower right corner in Figure 5.1) will lead to frustration and, possibly, to some academics leaving the university.

The frustrated university

The most significant aspect of this type of transition is the impact on individual academics. Many of them will argue that they have joined academia for the professional autonomy they had and that they enjoy the creativity associated with their role. However, as Olssen and Peters (2005) argue, by being defined from outside the academic role, targets and performance criteria are increasingly diminishing the sense in which academics are autonomous, challenging the concept of 'academic freedom'. Thus, the traditional notions of professional academic autonomy and freedom start to compete with a new set of pressures, with academics feeling that managers are imposing procedures on them, which do not comply with self-improvement and self- and collegial

accountability, the core values of the academic culture (Laughton, 2003). Moreover, academics often complain about the high level of bureaucratic work demanded from them, often deviating their attention from teaching and research (Newton, 2002; Harvey, 2006).

Therefore, as the university grows and moves towards the mass university corner, academics do not seem motivated to turn their creativity into developing consistent and, arguably, more efficient processes. In fact, they will resist the implementation of standardized processes, often imposed on them, claiming that the system prevents them from operating in the most effective way.

In this 'frustrating situation', academics often perceive that they still have high degrees of discretion, despite the standard processes being implemented. They sometimes feel they are 'above' the system, which does not apply to them, and that they can circumvent its requirements in order to get on with the job in the way they think best.

Managers at this type of university may want to restrict the degree of discretion of some or all of their academics. A common reason for this would be that, as a consequence of actual or desired growth, as a result for instance of widening access policies, systems and standardized processes, thus reducing the opportunity for individuals to develop their own way of doing things. This is particularly relevant in universities trying to comply with evaluation and accreditation processes.

The problem with academics that have become used to high levels of perceived discretion is that they find it particularly difficult to work in an environment where they feel that their freedom is restricted. They may comply with the system if the alternative is to lose pay or status in the university, but they find the system difficult to accept and are likely to become disaffected as a result.

It is important to recognize the concerns of these academics because they frequently possess the skills and knowledge that are essential to retain. This may be achieved in some cases by providing them with opportunities for development through involvement in activities that do not conflict with the objectives of the more standardized processes being implemented; this is often the case with a research-teaching divide. The university may grant more freedom in research in exchange for more compliance in teaching, which has become more regulated.

The transition will also put an increasing onus on managers, as they will be expected to offer a clearer direction for the university as a whole, and for its employees, in the form of strategic and action plans, and staff appraisal and developmental procedures.

In this rather organic style of organization type, the challenge will be to ensure a reasonably consistent approach, as great variability often brings in inefficiency. However, academics will resist the transition, which will probably be better accommodated if they can own the processes and be creative, rather than act as labourers that do not own up to their job.

The mass university

The mass university archetype is characterized by large volumes of students in an increasingly standardized environment. It represents higher education as a commodity service. Its focus is increasingly on a consistent service provision, prodded on by a multiplicity of regulatory agencies that regulate access and minimum quality standards, assured by evaluation and accreditation agencies. Power (1997) called this the 'audit society', submerged by rituals of verification and based on the intensive use of standardization procedures. Increasingly, members of academic staff receive formal standardized training before being allowed into the classroom. High volumes of students and consistent teaching procedures lend themselves to the use of information technology and distance or part-distance learning in an attempt to reduce costs.

Barnett (2000) uses the concept of 'performativity' to argue that marketization has become a new universal theme, commodifying teaching and learning and the various ways in which higher education must meet the new performative criteria with an emphasis on measurable outputs. As a consequence of this marketization, there has been an increased emphasis on performance and accountability assessment, with the accompanying use of performance indicators and individual appraisal systems. This has led to a shift from 'bureaucratic-professional' forms of accountability to 'consumer-managerial' accountability models, where academics need to demonstrate their utility to society and increasingly compete for students, who provide a considerable percentage of core funding through tuition fees (Olssen & Peters, 2005). This focus on accountability encompassed efforts to promote standardization, transparency, quality and efficiency by increasing surveillance and centralizing authority.

The management style of the mass university is frequently directive. The procedures have usually been designed by the centre, without consultation, which then carries out periodic audits to ensure compliance with what has been predetermined.

To avoid the trap of being a commodity service, mass universities may feel the need to differentiate from the rest and join the elite, by

extending the range of their service provision. The need to be different in order to be at the top has been enhanced by the introduction of league tables, from which *The Times* Higher Education World University Rankings and the Academic Ranking of World Universities (ARWU), published by the Centre for World-Class Universities and the Institute of Higher Education of Shanghai Jiao Tong University (China), are good examples.

Even though mostly used in the Anglo-Saxon world, the usage of league tables will most likely be extended to other countries. In fact, recent developments at the European level indicate the will to increase accountability, through the development of rankings and other classification tools.

The signing of the Bologna Declaration in 1999 has put more pressure on states to establish national quality frameworks and on higher education institutions to introduce quality assurance mechanisms. New decisions have been made at the follow-up meetings that happen every two years to analyse the implementation of the Bologna Process. In Bergen in 2005, the ministers of education agreed to the Standards and Guidelines for Quality Assurance in the European Higher Education Area (ENQA, 2005), drafted by the European Association for Quality Assurance in Higher Education (ENQA), in cooperation with the European University Association (EUA), the European Association of Institutions of Higher Education (EURASHE) and the European Students' Union (ESU, formerly ESIB). At the London meeting in 2007, the ministers of education established the European Quality Assurance Register for Higher Education (EQAR), based on a proposal drafted by ENQA, EUA, EURASHE and ESU (ENQA, 2007). While in 2009, the ministers of education held another meeting in Leuven, opening the way to the implementation of a ranking system, in a section entitled 'Multidimensional Transparency Tools':

> We note that there are several current initiatives designed to develop mechanisms for providing more detailed information about higher education institutions across the EHEA [European Higher Education Area] to make their diversity more transparent. We believe that any such mechanisms, including those helping higher education systems and institutions to identify and compare their respective strengths, should be developed in close consultation with the key stakeholders.
>
> (Leuven Communiqué, 2009)

Within this trend, the European Commission commissioned a report on the possibility of establishing a classification of European

universities (van Vught, 2009) and funded two projects to analyse the implementation of a multi-dimensional ranking system: U-Map and U-Multirank. Kaiser and Jongbloed (2010) describe these projects, '[While] the U-Map project provides a mapping of institutions, the U-Multirank project aims at a ranking of institutions'. These recent developments will most likely lead to a ranking of European universities and to the implementation of a stratified European Area of Higher Education.

By enabling comparisons, the introduction of these classification tools will most certainly drive universities into pursuing the quality that will enable them to reach the top of the rankings, thus allowing a few of them to be considered part of the elite group – back to the ivory tower.

However, the move from the lower right corner of Figure 5.1 towards the upper left corner will arguably raise anxiety.

The anxious university

The problem with commoditized higher education is that universities might seek to differentiate themselves in an increasingly competitive market and thus feel the need to move in the commodity-capability continuum. In this vein, they may wish to increase the amount of autonomy given to academics, namely to pursue research and/or third mission projects. They may also want to increase the range of their educational offering. In this case, academics may be asked to take more decisions and to carry out a greater proportion of the tasks needed.

This change may well be planned and executed, typically involving investment in training and support systems and including the recruitment of support staff (Sarrico, 2010). In these circumstances, academics may believe they are being moved from what might feel like a reasonably safe environment, where they are provided with a clear structure and procedures to follow, to one where individual decision-making is required.

The academics involved in this process may want to engage in this challenge, but feel either unsure of their own ability to do it or uncertain about how much real discretion the university is willing to give them. In this process of change, some academics may not perform immediately to the desired level and may be dismissed as not being up to the challenge.

The role of managers here changes from being the owner and 'enforcer' of procedures to ensuring that academics and support staff are developed. It is more likely that staff will be able to deal with the transition with support and training.

A schizophrenic situation for universities

Many universities will be under pressure to change, not choosing a particular corner, but positioning themselves in the capability-commodity continuum. On the one hand, the ivory tower university may be under pressure to increase the number of students it takes in and drive down the high per capita cost of operating. On the other hand, the mass university, dealing primarily with high numbers of undergraduate students, may be under pressure to become more flexible, offer customized education, become increasingly involved in third mission projects, all as a way to diversify funding sources and be more research directed, in an attempt to distinguish itself in a competitive environment.

If, at first, the move might have been in the direction of capability towards commodity, following a massification trend, pressures in the opposite direction can clearly be observed. Being requested to be both ivory tower and mass university, universities are put in a schizophrenic situation, suffering, at the same time, from frustration and anxiety. But how are universities dealing with this dilemma?

Coping strategies

Similar to other institutions, universities have been able to find ways of coping with conflict throughout history. Two types of coping strategies will be discussed here: loosely coupling and decoupling strategies, and translation strategies.

Loosely coupling and decoupling strategies

Scholars have used 'loose coupling' and 'decoupling' to account for the relatively weak influence of government policy on this type of institution.

The idea of 'coupling', in general, and 'loose coupling', in particular, came to prominence in the writings of Glassman (1973), in the context of Biology, and then of March and Olsen (1975), cited by Weick (1976), and Weick (1974, 1976), with regard to institutions in general and educational institutions in particular. These authors originally introduced the concept of 'coupling' to challenge functional notions about how organizations operate and argue for attention to their institutional environment. This term, usually defined as the 'relationship among elements or variables' (Beekun & Glick, 2001), captures how organizations are made up of interdependent elements that are more or less responsive to, and more or less distinctive from, each other (Hallett & Ventresca, 2006).

Orton and Weick (1990) introduce the dimensions of distinctiveness and responsiveness to differentiate four types of coupling. If there is neither distinctiveness nor responsiveness, the system is not really a system. They call it a 'non-coupled' system. If there is distinctiveness, but no responsiveness, the system is 'decoupled'. If there is responsiveness without distinctiveness, the system is 'tightly coupled'. If there is both distinctiveness and responsiveness, the system is 'loosely coupled'.

Weick (1976) defines 'loose coupling' as a situation in which elements are responsive, but retain evidence of separateness and identity. Orton and Weick (1990) argue that 'loose coupling allows theorists to posit that any system, in any organizational location, can act on both a technical level, which is closed to outside forces (coupling produces stability), and an institutional level, which is open to outside forces (looseness produces flexibility)'.

This concept challenged the assumption that organizations operated with clear means to an end goals, responsiveness and coordination. Moreover, it considered the existence of broader environments that interpenetrated organizations, further challenging the integrity of a unit-level organization (Hallett & Ventresca, 2006). The concept of 'loose coupling' was analytically powerful because it helped scholars to understand why many organizations, including educational institutions such as universities, continued to operate using familiar routines and practices despite waves of policy reforms and environmental pressures to change.

In many cases, these organizations avoid conflict by buffering 'their formal structures from the uncertainties of technical activities by becoming loosely coupled, building gaps between their formal structures and actual work activities' (Meyer & Rowan, 1977).

The concepts of 'decoupling' and 'loose coupling', that is, practices that enable organizations to sustain formal structures while unit activities vary, represent a break with the assumption that structure controls actions.

This perspective is particularly relevant in universities, given their high degree of autonomy and their integration into the state hierarchy. On the one hand, universities must adapt themselves to the various strains of public authority. By contrast, the norms of academic freedom and autonomy dominate internally. The result of state control on the one hand and autonomy on the other implies that we are dealing with complex organizations where the formal and the informal are partly opposed to each other. Problems that arise where different 'logics' meet are solved with apparent adjustments. 'Loosely coupling'

and 'decoupling' strategies have thus been used in these institutions as coping strategies to resolve the tension between formal structures and informal practices. There are also institutions simultaneously aligning with and decoupling from multiple external pressures and influences in order to cope with and survive the multiple underlying logic that motivates them. These are hybrid institutions (Parker, 2011).

Going back to our model, several examples of coping strategies for dealing with anxiety and frustration are presented.

The ivory tower within the mass university

One possible strategy would be to have two universities emerging within each university, with one set of academics feeling they are working for the mass university and another for the ivory tower. The first group will most likely be on teaching contracts only, mainly teaching under-graduates, or will be moving from one research assistant position to the next, mainly on temporary contracts; the second group will be in tenure-tracked positions with time and resources to do research, low teaching loads, the possibility of sabbaticals and will be teaching mainly postgraduate, fee-paying students. In this case, different strate-gies to accommodate the ivory tower within the mass university can be observed.

Modular organization as a form of customization

More and more often the teaching offered by the university takes the form of modules. This allows for the appearance of customization in a, for all purposes, mass education format, whereby students may choose from different teaching modules, thus 'customizing' their syllabus and thus having the experience of 'personal service'.

Differentiation between teaching and research

The university will benefit from standardization at the level of under-graduate provision, becoming more customized at the postgraduate level. Increasing separation of teaching and learning from research and scholarship, with dual career paths formally acknowledged or emerging in practice will occur as a result of promotion policies. Another emergent phenomenon might be the actual creation of separate organizations within the university, such as 'centres of excellence', where people are shielded from the perils of the mass university by way of increased resources for postgraduate supervision and research, and scholarship activities, in a very autonomous environment.

The accommodation of the two archetypes might be better accomplished in university systems that operate as a network, such as the California state system (Douglass, 2000) or some other multi-campus universities with different units, which cater for different missions.

Translation strategies

The translation view highlights the significance of the local context and local actors as they confront ideas and practices from around the world (Czarniawska & Joerges, 1996; Czarniawska, 2005). The translation process takes different trajectories depending upon the context in which the translators are able and willing to reframe or transform existing institutional settings in ways that fit the current demands.

Czarniawska provides the shortest definition of the translational approach to fashion. 'Fashion creates as it is followed. It is the subsequent translations that simultaneously produce and reproduce variations in fashion: repetition creates and re-creates difference. [...] Fashion stands for change. But as fashion is also repetitive, in long-range perspective it stands for tradition' (Czarniawska, 2005). While previous views of fashion limited it to certain processes to avoid paradoxes, the translation view, according to Czarniawska (2005), better enhances our understanding in exactly those paradoxical terms:

> Fashion, then transpires as a highly paradoxical process. Its constitutive paradoxes are invention and imitation, variation and uniformity, distance and interest, novelty and conservatism, unity and segregation, conformity and deviation, change and status quo, revolution and evolution. And it is indeed translation, side by side with negotiation that is used to resolve these paradoxes in each practical action.

However, if fashion setters are not pushing fashions on fashion consumers, why do specific ideas, objects and techniques travel widely while others do not? In their chapter, 'Translation Is a Vehicle, Imitation Its Motor, and Fashion Sits at the Wheel', Czarniawska and Sevón (2005) talk about a market in which management fashion producers sell the same management innovation to similar buyers and the notion that innovations diffuse because fashion setters push them onto passive adopters, like marionettes. It is the act of imitation by many translators that marks them as fashion followers. These imitators in turn create the reputation, as successful fashion setters, of those they imitate or presumably they would go out of business.

What drives fashion is a shared desire to arrive at the same result. Each fashion, and the travelling imitative translation it animates, must be understood in the historical and special context of the previous fashion it displaced and the next fashion that will replace it.

Going back to our model, some universities might attempt to be fashion followers, while others will be fashion producers. Fashion followers might try to implement certain procedures, processes or structures in order to imitate those they see as natural leaders (the best universities in the rankings). These 'imitation' behaviours can be seen when comparing the mission statements of several universities. Indeed, as Parker (2011) argues, 'the missions that universities formally publish are increasingly convergent and homogenised'. The obsession with published rankings often leads universities to try to be at least as good as the 'fashion setters'. That means setting the same demanding objectives, which will enable them to move from mass university to ivory tower, where in this respect, of course, the local context plays an important role. In the process of reframing or transforming existing institutional settings, some universities will get there and build a reputation for themselves. Others will not succeed and remain at the lower corner of Figure 5.1, as undistinguished mass universities.

Conclusions

A problem with the existence of the ivory tower and the mass university archetypes is the possibility of a divergence between what is 'promised' or 'aspired to', typically the ivory tower concept of university, and what 'exists' or 'needs to exist', typically the mass university. The perceived gap between the two concepts may affect academic satisfaction, but also student satisfaction, since what is expected by both is beyond what is experienced. In our discussion, it seems that the university is destined to permanence in a state of tension, be it frustration or anxiety, as there are forces pushing it in the direction of the mass university, such as policies to widen access, and forces pushing it in the direction of the ivory tower, such as 'excellency' policies trying to position national systems in an increased global and competitive environment of higher education.

The management of universities is finding strategies to cope with these tensions, trying to accommodate the ivory tower and mass university types within them, if not explicitly choosing a firm position in the capability–commodity continuum.

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