Changes in school governance and the reshaping of head teachers' roles and identities in Portugal

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Introduction

The last 20 years have seen an ongoing redefinition of public policies regarding school management in Portugal. This reconfiguration has brought implications for the conditions, processes and practices of head teachers' work. The proposed changes are part of a movement of changes in school management which is occurring on a transnational scale and is associated with a common denominator: public administration reforms implemented by the New Public Management (NPM).

This chapter focuses on the ways NPM assumptions, which directly or indirectly influence head teachers' work, are being received and interpreted by these actors in Portugal. Our interest stems from the assumption that NPM orientations coexist with national policies, local contexts and historically constituted frames of reference regarding the role of head teachers, thus creating some degree of ambiguity and uncertainty in school management. Hence, the various ways these orientations are received by head teachers are taken as analysers of the continuities, changes and tensions in the regulation processes[1] regarding school leadership and management.

The chapter is based on an empirical study developed on the basis of interviews conducted with head teachers[2], with a view to better understanding the changes they perceive in their work. The findings of the study point to an increasing complexity of the regulation processes, which we believe derives from the coexistence of traditional regulation methods with the emergence of NPM regulation methods. We have also drawn some conclusions as to the effect they have on the perceptions, meanings and orientations for head teachers' action.

The chapter has four sections. The first section begins by referring to studies that discuss NPM doctrines that are circulating on a worldwide scale, associated with a 'managerial canon', which have reshaped the role of head teachers. In the second section, we show how the Portuguese case can be used as a prime example to observe and study the changes in school governance and the reshaping of head teachers' roles. In the third section, there is a focus on

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[1] By regulation we mean the social process of the production of rules and guidelines for conduct and behavior by social actors in a particular social context (Maroy & Dupriez, 2000).

[2] Those responsible for the school unit or cluster.

the interpretative lines emerging from our empirical study, showing some of the possible effects of NMP on head teachers' descriptions of their work, and their struggle for greater professional autonomy. Finally, in the final considerations section, the implications of NPM on head teachers' perceptions of their daily work are discussed.

NPM and the role of the head teachers: regularities and variations

At a transnational level, and since the late twentieth century, the "managerial school" (Gewirtz, 2002) or a managerial canon (Ball, 1999; Lima, 2011) have become well known terms that reinforce a set of scripts for action imported from business and corporate management, and employed in the school context in the name of effectiveness. As a consequence, the expectations and requirements regarding the work of head teachers have also become part of a semantic universe dominated by a call for education quality, modernization, performance evaluation, accountability, competitiveness among schools and school systems (see Power *et al.*, 1997; Dupriez, 2005; Cattonar, 2006; Lessard & Brassard, 2007).

Part of the discourse laden with new expectations for school leadership has been promoted by international organizations that produce, promote and disseminate studies, recommendations and analyses that seek to reshape the work of head teachers. For example, in 2009, the OECD published a toolkit on its website for school leadership, designed to help policy makers, practitioners and relevant stakeholders analyse school leadership policies and practices, and to develop a common understanding of where and how to take action based on the "OECD Improving School Leadership" policy recommendations (OECD, 2009, p. 3). More recently, through TALIS 2013 data, the OECD (2016) published the "School Leadership for Learning", reinforcing the idea that "school leaders are the most likely actors to initiate the further development of professional learning communities" (OECD, 2016, p. 35). Similarly, the European Policy Network on School Leadership (EPNoSL), a European consortium created in 2011, geared towards school leaders' professional development, published a School Leadership Toolkit "designed to provide policy makers, school authorities, schools, researchers and teacher training institutes with the tools to reflect upon, identify challenges and prioritize areas for policy action" and "to help school leaders identify areas where they need to improve on their competencies and daily practice" (EPNoSL, 2014). It is also worth mentioning that the Wallace Foundation, one of the largest private foundations in the United States, elected school leadership as a priority in its action, reinforcing and spreading the message that there is a direct link between school leadership and pupils' outcomes (Seashore *et al*, 2010).

As already mentioned, the dissemination of these discourses and their call for a reconfiguration of the work of the head teacher are part of a broader and transnational State reform movement and its traditional role in educational policy-making. In fact, this has been on the educational research agenda since the late twentieth century.

Some of these authors refer to a shift in the education regulation methods to a "post-bureaucratic" regulation regime, in order to describe the progressive introduction of new types of coordination and control of public action that go beyond the "bureaucratic-professional model": the "evaluative State" and "quasi-market" are now better descriptors of

the ways by which head teachers' functions are redefined from a managerial perspective, emphasizing evaluation, accountability, contracts, awards and good practices (Maroy, 2012).

Other authors refer to managerialism as a cultural production in search of a "new political" agreement to import private management principles and practices into public services (Newman & Clarke, 2009). In its search for new organizational forms, technologies and practices, managerialism produces new narratives that affirm the (supposed) success of business management in public services and administration.

Finally, some authors refer to NPM, whose doctrines and instruments circulate on a worldwide scale, in the name of modernization and improvement of the public services (Verger and Normand, 2015), and are materialized in State reforms, public service reforms and the professions that operate within them.

The global presence of NPM in State policy reforms in several national and even civilizational contexts has become evident in common spheres of change. According to Hood (1995: 95-97), these dimensions include greater fragmentation of public services into more independent management units; greater competition within the public sector and between the latter and the private sector; the use of management practices of the business world; greater emphasis on "discipline and frugality in resource use"; strengthening of the discretionary power of top managers and the use of more explicit and measurable performance standards. More recently, within the scope of NPM principles and prescriptions in organizational settings, Bezes *et al* (2011: 295) emphasized the division between positions related to strategy, management and control on the one hand, and operational and implementation positions on the other, to further the gap between those who design and those who carry through organizational actions.

In educational policies, the presence of NPM has been noted in an increasing number of interventions, such as, for example, the professionalization of head teachers and the strengthening of their action; through the definition of educational success quality indicators and benchmarks; through school autonomy and school-centred management; the publication of school results in standardized tests; public subsidies for private schools; external evaluation of results; payment to teachers based, for example, on merit or productivity criteria (Gunter & Fitzgerald, 2013).

The presence and effects of these policies on head teachers' work is well documented in the specialized literature. The work of Power *et al* (1997) should be noted, as it provides information on the ongoing reforms in Australia, the United States, England, Scotland, Wales and Sweden in the late 90s, when growing pressure mounted for the heads to be more "actively involved in the new modes of management", while simultaneously having to deal with the contradictory demands of the public authorities and the educational market (Power *et al.*, 1997, p. 356). Simkins (2000) illustrates how in England and Wales the head teacher was expected to become more "customer-focused" and to "meet demanding targets in terms of measurable performance indicators, set by central government or its agents" (Simkins, 2000, p. 330). In the case of France, Dupriez (2005) points to a redefinition of the head teacher's role, which should be more committed to educational projects, collaborative work with peers

and the community, while also developing further management skills. Referring to Canada, Cattonar (2006) and Lessard & Brassard (2007) note how the school has gradually become a "unit of accountability", bestowing greater responsibility upon the head teacher in terms of the quality and effectiveness of the educational service.

Thus, it may be said that current public policies regarding school management, which defend more autonomy, more accountability and more responsibility, have led to the increasing scrutiny and formulation of high expectations in terms of the effects of head teachers' action. As referred to by Gunter (2012), the head is the protagonist who will 'transform' and 'deliver' what is required for a successful outcome. Consequently, this has led to growing pressure on the work of head teachers. In fact, several authors refer to the work of head teachers by using vocabulary such as "tension" and "conflicting demands" (Moore *et al*., 2002), "stress" (Phillips & Sen, 2011), "survival strategy", "intensification" and "almost impossible job" (Macbeath *et al*., 2012).

However, and despite its widespread diffusion, the influence of NPM policies on education public policies is quite variable in each national context. This variability is the result of both the composite and sedimentary nature of NPM, and the political specificities of the contexts in which it is reinterpreted (Carvalho, 2016).

On the one hand, NPM is not a homogeneous or "monolithic" entity as interpreted by Hood (1995), but rather a complex of beliefs and instruments associated with the reform of the state and its administration. In fact, NPM has developed as a result of the sedimentation of successive layers (Bezes, 2005) and the overlap of several historical variants: the neoliberal agenda, associated with (alleged) slimming down policies carried out by the New Right; the call for more participation, autonomy and transparency; the variant of state bureaucracy control; and the variant stemming from the creation of new remote control mechanisms, namely through digital devices that produce and monitor performance indicators, enabling comparisons, benchmarking and the definition of quality standards.

On the other hand, NPM orientations have diverse interpretations and effects on national policies and specific local contexts. Indeed, educational policies appear to be an excellent channel through which these variations may be observed. An interesting and recent analysis of this variability is given by Verger and Normand (2015) in the confrontation of European and American contexts. Among other differences, and concerning head teachers' professionalization and power in schools, the authors highlight the difference between policies that aim for more shared leadership *vs.* the head teacher's increasing power and authority.

Moreover, this variability is also justified by the fact that in each national context, the rules on "how to get things done" are adopted by a miscellany of local actors, with different knowledge, resources and interests, who operate in specific belief and power relation systems. Hence, beyond national translations, NPM and managerialism policies also encounter local context specificities.

In countries where the state plays an important role in public policies, with more bureaucratic regulation methods (based on legal authority, formal hierarchy and rules), NPM orientations –

managerial policies and new regulation methods - frequently coexist with other historically instituted forms of regulation, creating a hybrid effect on public policies. A good example of this hybrid nature in current educational public policies may be found precisely in school management:

> *"(…) school management is devolved and 'made private', while school aims, standards and evaluations are centralized and nationalized, that is, 'made public'. Thus, paradoxically, the state strategically steers national school priorities and outcomes, while policy discourses promise 'free choice', 'school autonomy' and 'diversity'"* *(Falabella, 2014, p. 3).*

Therefore, our study takes into account historical paths and local translations regarding the role of head teachers. Thus, in the next section, our interest in studying the Portuguese case is presented.

The Portuguese case

In Portugal, public authority interventions towards strengthening the role of head teachers are clearly associated with NPM trends: school management is increasingly becoming a specialized occupation; there is a growing tendency to "govern by contract", which is visible in the school autonomy hiring policies, justified by central government as the need for more educational agreements and co-responsibility; public scrutiny of school government and management is equally on the rise, namely through the monitoring and evaluation of school results conducted by the inspection agency (Carvalho, 2016). As far as the first trend is concerned, we refer to the "differentiation" of school management as a specialized occupation to reinforce the particular and unique position of the head teacher in current school management in Portugal, which may be observed in three public authority interventions:

First, the creation of a single management structure for school governance. By emphasising the effects of strong leadership on school quality, and seeking to boost the participation of communities in the strategic management of schools, the public authorities introduced the figure of the school head teacher, moving away from the tradition of a collegial body of school management that had existed since 1974. This option is a good example of NPM orientations, in which more power and responsibility is claimed for top managers in public services and organizations. This single management structure confers more power, along with administrative, executive and evaluation duties on the head teacher in relation to other teachers. Simultaneously, in order to apply for the position of head teacher, specialized training in school administration and educational administration is now required.

Second, the consolidation of school clusters, that brings together schools from different cycles (primary and secondary) under a single management structure and a single head, seeking, primarily, to reinforce collaboration among schools. It should be noted that since the beginning of the century, a reduction of approximately 4700 schools units and respective top manager positions has been observed (CNE, 2014).

Finally, in 2007, the Department of Education created the School Board, a consultancy government agency on educational policies, where head teachers play an institutional role (at least in a symbolic manner) in the governing of the educational system.

In short, the afore-mentioned changes in public policies regarding school management and their convergence with NPM orientations make Portugal a good example to observe and study the processes that involve the reshaping of head teachers' roles and identities. Thus, considering the transnational scenario of public policies and educational discourses regarding the role of school heads, our interest lies in describing and analysing the orientations head teachers give to their actions, and what they do in their daily lives and their local social contexts. More precisely, we are interested in understanding the ways head teachers interpret, translate and readjust the coordination and control interventions that target them in their specific contexts of action.

This interest stems from the assumption that policies are a process and product of the intervention of public authorities, through their normative production devices and executive intervention, but also a product of other social actors positioned at different levels of action (local, national, supranational) (see Ball, 1993; Rizvi & Lingard, 2009). All these actors take part in the definition of public welfare, around which school activities should occur and participate in determining how such activities should be coordinated.

Reshaping of head teachers' roles: searching for local translations

As a starting point in the accomplishment of our empirical study, we refer to the words of Rauch (1999, p. 98): "Today, heads have to fulfil a multitude of different, sometimes even contradictory roles and need to react to different external influences on their school (Rauch, 1999)". In fact, we are committed to better understanding the local translations of these "external influences", with a view to identifying descriptions made by head teachers of their work that result from NMP influences. To this end, we have used the concepts of institutional regulation and autonomous regulation. The former refers to the set of all orientation, coordination, control and balancing of the system mechanisms, established by educational authorities in educational policies; the latter is to observe the way local actors appropriate and (re)adjust control mechanisms according to their interests, as a means to maintain or increase their autonomy margins (Maroy, 2012).

The empirical study follows a general approach of a qualitative nature, affiliated to the participants' perspectives and sets out to comprehend the (self)-perceptions and prescriptions of head teachers with regard to their daily work. Following a methodological tradition in educational policy studies (Ozga, 1999) and school leadership (Briggs *et all*, 2012), eighteen interviews were conducted with head teachers of state schools in the metropolitan area of Lisbon (the excerpts of which are referred to in this text as I1, I2, I3…). With the exception of two cases, all the interviewed head teachers had over 10 years experience as top managers of their schools, and 6 of them had held the position of head teacher for over 20 years.

The analysis of the interviews pointed to some possible effects of the intervention methods regarding the work of head teachers, and the reception and interpretation on the part of the

latter. These findings are presented and discussed in the next sections: the sense of repositioning resulting from the redefinitions of NMP inspired public authority orientations, and the struggle to maintain their autonomy.

NPM and repositioning

A first line of interpretation taken from the interviews is the perception of a repositioning of the head teacher, as a result of public authority orientations, that is, of the institutional regulation which led to a feeling of closer proximity to central government. This repositioning stems from the creation of new diverse control, evaluation and accountability devices, as the work of head teachers became part of teachers' performance assessment, responsibility/accountability for student success rates and the need to fill in and update school-related data on new digital platforms, as mentioned by our interviewees:

> *The head teacher is a single management structure, there is no board, only a head teacher who is requested to undertake pedagogical and financial responsibilities (I2).*

> *When results aren't good enough, you have a problem (I8).*

> *You have no idea of the procedures (…), of all that has to be done in the school, all the small things, the salaries, the enrolments, accountability, the digital platforms… and everything must be updated daily (…). Why is there so much control now? Such control is not pedagogical! (…) It is bureaucratic and administrative (I14).*

> *All the responsibility is mine. No one else's (…).And now we have all these digital platforms to provide data for the Department of Education, the municipality, for the exams, for the teachers' evaluation… we have to be aware of deadlines at all times (…). It used to be different, we had more time. We were not so tied to this control as we are now, constantly. Now we are profoundly controlled (I15).*

Two important consequences may be drawn from these speech excerpts:

First, head teachers perceive more pressure in their work as this repositioning is associated with an increase in bureaucratic work and a change in the physical and human scale of the organization they manage. In fact, with the exception of one, all the interviewees reported not having a typical day and that their daily work was "unpredictable", "uncertain", "with no routines" and "with frequent interruptions". Suggestively, in response to the question 'what's your daily work like?", one of the head interviewees replied: "I have to manage. How do you do that? I cannot explain, but it is totally crazy!" (I18).

Second, some of the interviewed head teachers described themselves as managers of an educational enterprise. These head teachers used leadership as a highly relevant personal characteristic for the job, taking pupils' success rates, projects, awards, marketing and promotion of the school image as preferential management strategies:

> *I think I have strong leadership (…) and the inborn characteristics that enable me be listened to (…). The visibility of the school transfers more confidence to the community*

> (…). We need to be present in the social media (…) [because] it promotes the image of the school (E3).

> Being the boss is not being a leader. It is important for people to recognize a leader in the head teacher even when they do not have a close relationship with him/her (…).The majority of teachers are in tune with my speech and orientation (…). We need to have more projects, dynamics and to promote the image of the school in order to attain better results (E4).

> I'm concerned, and we have to improve our position in the school rankings (E10).

> I think it's like running a business. Of course there are other components, but (…) the work is very different to that expected of teachers. And it is also very appealing! (E15).

The perception of repositioning, on the part of the interviewed head teachers, is assumed through a reinforcement of their role as managers of accountable units of the educational system. These data point to a redefinition of the work of head teachers, resulting from the NMP. However, these new prescriptions and demands have also paved the way for uncertainty and a reinterpretation of new forms of action in the management of schools, as is presented in the next section.

The struggle for professional autonomy

The second line of interpretation we draw from the head teachers' interviews is related to their struggle for professional autonomy in order to maintain, or even increase, their autonomy margins. This speech is constructed around tension triggered by the repositioning they are experiencing. As stated by Thomson (2010), "head teachers' desires for autonomy are logical" since they are now compelled to defend their school and develop an increasing sense of the fact that they have their schools to run (Thomson, 2010, p. 16). Their intention to struggle to maintain or increase their autonomy has been manifested in three dimensions.

First, while head teachers assume a reinforcement of their role (defined in the legal-normative framework), they also criticise a set of constraints, determined by the government, as illustrated in the following interview excerpt:

> I have more responsibility, but it is in conflict with my autonomy: I'm asked to do things that contradict the pre-existent laws and rules. This blocks my action! (I5).

These words do not simply outline the contradictions between rhetoric and practice. In fact, what emerges as being most significant in the speech of some of the interviewees, is what some authors refer to as "paradoxical injunctions" (Marechal-Gardez, 2004, cit., Barroso, 2011) imposed by central government. In other words, compliance with a rule or form of action implies non-compliance with another, both of which are legitimate and recommended. Consequently, head teachers feel compelled to consciously act in a contradictory manner.

Second, head teachers seek to adapt and readjust the coordination and control interventions that target them. Described by one of the head teachers as "corridors of freedom that one

needs to understand how to take advantage of" (I3), these local policy regulation methods have been divulged in three areas.

The first is related to the use of devices to interpret the normative orientations according to their particular context of action, and the devaluation of normative orientations, namely those of the normative framework, in relation to their practical effects, as may be observed in the following examples:

> *What I have to do is read and interpret the law in the best way. (...) It's not avoiding the law, it is attempting to apply the law in a flexible, more open way, so that pupils and teachers (...) are not jeopardised (I7).*

> *Despite the changes in the legal framework, people do their best to keep things the same (…). Mentalities do not change with the law (...) no matter how far the law demands change (I4).*

This phenomenon was also present in some of the interviews when the head teachers reported the maintenance of shared management practices with their peers, even though the legal framework centralizes the responsibility for school management in the head teacher:

> *Decrees have not changed my action. Even if we are not an elected group,… the procedures, interactions and shared decision making processes are the same [as before] (I6).*

> *Despite the law and the rules, one acts as one sees fit (…). I have a team and they also make their own decisions (I8).*

Finally, some of the interviewees gave importance to a personal, pedagogical agenda, as opposed to the new demands they perceived as arising from the role of head teacher:

> *I have a plan of action. I dedicate a lot of time to dealing with pupils and incidents (...). But it is on the basis of a resolution of these incidents that I intend to build my school, my project (I3).*

> *Despite the need to meet deadlines and other bureaucratic procedures, I always try (...) to give priority to the important situations which are, in fact, the pedagogical ones, [although] this can sometimes be difficult (I5).*

At this point, an overlap of action scripts, stemming from the tension between differing frameworks regarding the role of the head teacher, became clear. In fact, some of the interviewees looked upon themselves fundamentally as teachers, and shared a declared passion for pedagogical issues, namely through their desire for closer proximity with pupils, their defence of the state school, being critical towards the rankings, competition among schools and managerial tasks and demands:

> *I am more interested (…) in how the teacher and pupils work, the interactions among pupils, between pupils and teachers ... Otherwise, we would have a purely administrative school and that is something anyone can do (E1).*

> *We can't compare a school to an enterprise (…). The pedagogical issues are fantastic (…) and the head teacher should be involved in them (E5).*

> *I attended a course on conflict management, meetings, budgets (…) but what I really like, because I'm a teacher, is teaching and being with the pupils (E11).*

However, the most interesting feature to emerge from the interviews of the empirical study is the fact that the work of head teachers falls within a number of frames of reference. The data analysis showed that our interviewees simultaneously used managerial and pedagogical repertoires to describe their work, through an ambiguous discourse, in which they defended both the interests of their pupils and peers, while also adopting a managerial discourse or entrepreneurial scripts. For example, three head teachers were particularly committed to economically disadvantaged pupils, pupils from ethnic minorities and those who had failed school, and went on to develop specific programs for them. At the same time, they showed real concerns for the need to improve the school image by adopting a marketing discourse. Another sign of ambiguity in these head teachers' speeches may be observed in the critical discourse of some towards school rankings and student selection, while also feeling compelled to develop marketing strategies. For example, one of the interviewees stated the following:

> *Some schools are selective and choose the blue eyed pupils, mummies and daddies' babies, programmed to be good pupils (…). We cannot choose our pupils because this is a school for all.*

Further ahead, he also claimed the following:

> *We do marketing (…), present our courses (…) to all the schools in the area, we advertise our school offer. (…) This year we even organised an event, an open school day for the community (E7).*

The interviewed head teachers clearly indicated a growing appreciation of management skills in their work to strengthen their role as heads, and an awareness of the tension generated by this process, given the teaching and professional interests they defend. Hence, in the perceptions of the head teachers, it was possible to identify a common appeal to other historically constituted frames of reference regarding their roles (Barroso & Carvalho, 2009), namely: the school head as an enterprise manager who displays technical skills in line with those of a CEO, concerned with results and efficiency; the school head as a professional with corporate interests, committed to defending the interests of his/her peers.

Final remarks

The data showed that the work of the head teacher can be taken as a powerful analyser of the effects of NPM inspired school administration policies, for two reasons. First, the head teachers share a perception of repositioning: despite reporting more autonomy in school management, due to the extension of their competencies and duties, they appear to feel closer to central government and, consequently, more detached from their peers and pupils. This repositioning is conceived as a result of public authority orientations that call for a greater

need for accountability. These data are in keeping with the study of Rinne *et al,* (2016), which showed that head teachers perceive more autonomy in their position, while simultaneously experiencing an "increase in surveillance, monitoring and evaluation" (Rinne *et al*, 2016, p. 781).

Second, the head teachers reported a coexistence of divergent conceptions of their work: those that are created and disseminated through the rhetorical intervention of the public authorities - the manager - and those they produce themselves, according to their own professional frames of reference and contexts of action – the teacher. These data point to an intensification of tension among the professional, pedagogical and managerial roles of head teachers (Rice, 2006). Nevertheless, it is worth noting the following: while it is clear that the pedagogical issues are still the most important for some of the head teachers, they also coexist with the fact that "the realities of daily life often subvert the most committed professional" (Bredeson & Kose, 2007, p.1), and that evaluation, monitoring, maintaining and updating digital platforms are equally important. The phenomenon can, therefore, be understood as a sign of the combined effect of autonomous regulation and institutional regulation modes through bureaucratic and post-bureaucratic regulation modes.

Thus, this study has shed light upon the complex process of redefining the role of the head teacher, confirming that there is no direct transposition between the influence of NGP and local translations.

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