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NEW ZEALAND BOARDS OF TRUSTEES’ SELECTION OF PRIMARY SCHOOL PRINCIPALS

Keren Brooking
(BA Dip Soc Sc Dip Tchg)

I certify that the thesis entitled:

"New Zealand Boards of Trustees' Selection of Primary School Principals"

submitted for the degree of Doctor of Philosophy is the result of my own research, except where otherwise acknowledged, and that this thesis in whole or in part has not been submitted for an award, including a higher degree, to any other university or institution.

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Abstract of Thesis for Examination

The selection of school principals in New Zealand has been the sole prerogative of individual board of trustees since the administrative reforms of "Tomorrows Schools" were instigated in 1989. Over the fifteen year period since then, boards have continued to appoint men to principal positions in disproportionate numbers according to their numbers in the teaching workforce. In 2002 when the data for this study was collected men comprised only 18.5 percent of primary teachers, but held 60 percent of principal positions.

This study investigates the selection practices of a number of boards of primary schools throughout the country in an attempt to establish whether the EEO merit principle was the basis for selection decisions or whether other factors were coming into play. A feminist qualitative methodological approach was used to interrogate the interview data employing Bacchi's approach to discourse analysis. Specifically they were 'what's the problem represented to be?' (1999) and 'policy as discourse' (2000).

Policy elites were interviewed at the national level, followed by focus group interviews of board chairs, male and female principals and advisors to the board at the school level and finally three case studies were investigated at the micro-level.

As a background to understanding the 'problem' of the gender diversity representation of the principalship, an analysis was done of the dominant discourses that emerged during the restructuring reforms in official policy, legislation and documents. An analysis of the interview material gathered from boards, principals and advisors to the board revealed the predominance of two discourses from this context. Gender discourses and market discourses dominated and were found to significantly influence decisions around the principalship.

The influence of gender discourses in board's decisions is not a new finding in the literature, but while it has long been suspected as being
significant, it is often not admitted to by employers. The surprising finding in this study is the degree of honesty by boards about the influence of gender and the way it does come through as such a dominant discourse. The new finding in this study is the degree to which market and business practices, values and beliefs influenced appointment decisions, in the large urban schools where the board chairs were CEOs and business managers. The interesting finding of these boards was that they had appointed according to the merit principle and women had won these jobs.
This thesis owes its existence to a number of people, who I wish to thank.

My supervisor Professor Jill Blackmore has been inspirational and more than patient in helping this document emerge. She provided the ideas for the theoretical framework and analysis, and “stretched my grey matter” in the process of thinking about and analysing the results. I am very grateful for her wonderful sense of humour and encouragement throughout. My six months sabbatical at Deakin University, where I had ready access to Jill, while writing the first draft was academically productive and very enjoyable.

The person I am most in debt to for getting me through this challenge is my husband Graham Collins. He and I embarked on the PhD journey together and shared many discussions and experiences which made the process so much more interesting and enjoyable. Graham’s positive encouragement, love and support has been immeasurable.

I am also indebted to colleagues at both Deakin and Massey University who have provided support and assistance. Dr Marian Court as my New Zealand supervisor has provided sound advice and helpful suggestions. Professor Terry Evans and Heather Davis from Deakin provided extremely supportive structures in the HDR programme for distance students, including summer and winter schools. Technical assistance has been invaluable and Vicki Greed and Jude Tait competently transcribed hundreds of hours of difficult focus group interviews. Philippa Butler and Janet Parsons did a meticulous job editing my script, and Tracey Beattie-Pinfold was invaluable in formatting and printing off the thesis, after sorting the gremlins in the system that corrupted all the footnotes.

Thank you finally to the participants in the study, who made the entire thesis possible. The many board members principals, principal advisors and national 'elites' who have given up their precious time and spoken so
sincerely, have in my opinion given this story its own particular essence. I am truly grateful to them.
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CHAPTER ONE

INTRODUCTION

Introducing the Research Issue and the Researcher

This thesis focuses on the selection of primary school principals by boards of trustees, which are the governing bodies in New Zealand schools. Since 1989, when self-management administrative reforms were introduced, boards of trustees have had absolute autonomy to appoint the principal of their choice. Boards are not bound by any regulations, Ministry of Education authority or accountability factors in this choice, unlike other countries with similar self-management policies. This unregulated climate has proven to be problematic with regard to gender in the choice of principals, as boards have consistently appointed males disproportionately to the principalship.

For three reasons, selection of primary school principals by boards of trustees became my research interest. First, because of my early experiences of gender discrimination as a girl, followed by my interest in Women’s Studies as a young mother. These alerted me to the broader issues around gender and social justice. Second, my own experiences involved in working on a board of trustees as a parent and being involved in the appointment of a principal provided first-hand experience of some gender-biased practices. Third, later Equal Employment Opportunities (EEO) contract work as an academic with the Ministry of Education proved to be a unique opportunity to observe the extent of the problem of gender discrimination in principal selection that was occurring at a national level. The EEO legislation in the State Sector Amendment Act 1989 (see Appendix One) requires boards to develop, publish, implement and report on an annual EEO programme (Government 1989a, section 3). While the
Act is prescriptive about recruitment procedures, it has no powers to enforce good practices.

My earliest experiences of gender discrimination have provided a backdrop for a long-standing interest in feminist issues and gender relations. My childhood was a relatively unusual one for a white child in New Zealand in the 1950s, in that I grew up in an isolated Maori community in the North Island where my teacher parents had elected to do their country service. Pre-adolescent girls and boys in Maori culture were expected to be tough, physically skilled, self-reliant, independent and self-directed in their play, and my parents seemed happy to go along with this. From memory there were no gender restrictions in clothes, speech, hairstyles or mannerisms, and no culturally induced expectations that impeded or differentiated our play in those first ten years. We all swam in the river, climbed trees, ran over hills, went eeling, rode horses, played marbles, softball and chasing, and made huts in the bracken together.

It was therefore a huge cultural shock for me to be shifted to an urban school of white working-class children at the age of eleven, and to suddenly realise that girls and boys had defined and quite specific gender roles. I remember reflecting on differences, injustice and gendered discourses. I very quickly learnt to stop beating the boys at marbles, to stop hitting the softball over the fence, and to start wearing shoes and socks. The socialisation into gender-specific behaviour was intense for the first few weeks at the new school and carried out mainly by the girls, but also by the boys in the form of jeers and taunts.

My early ideas about gender justice and injustice were framed within this very specific timeframe, and have formed the base on which later experiences have been built. The over-riding learning from these early experiences, however, has been that ability, skill, prowess and leadership in any area has more to do with intelligence, experience, practice, commitment and persistence, than gender. These insights made me wary about my later positions as teenage girl, student, young married woman,
teacher, mother and older woman. I returned to postgraduate study when my youngest child was three, in 1987, and did a Women's Studies Diploma. For the first time in my education I felt that the learning I was doing was meaningful. As I reflected on my life history I found liberal, radical and socialist feminist theories did help explain the circumstances, power relations and experiences I had encountered, as well as those I came across in my work with boards as an EEO consultant.

As an academic, I directed the EEO contract for six years. As it was a national contract that involved working with boards from all over New Zealand, I gained a unique perspective of board selection practices and preferred candidates. I had an 'insider' viewpoint (Oakley 1981) which often differed considerably from the official Ministry view. I began to notice that the anecdotal horror stories about discriminatory appointment practices, which I was hearing from boards and principals and from the twelve regional facilitators in the contract, were not just occasional deviations or odd occurrences, but were starting to form consistent patterns. These practices always acted against women gaining principalships, and many of the stories contravened the Human Rights Act (1993) or EEO principles. It was at this point that I decided to investigate principal selection practices in more depth, and chose a feminist approach to research this topic.

Research Questions

This thesis seeks to explore the relationship between gender and appointments to educational leadership positions in the context of New Zealand's restructuring reforms. Prior to the 1989 restructuring, women were beginning to be promoted into principal positions, albeit slowly, as a result of a number of studies that clearly demonstrated the gender disproportion in the principalship (TEACAPS 1982; Slyfield 1993). However, since 1989 when boards were given employer powers, this trend had faltered. Initially, the aim of my study was to increase my
understanding of board selection processes and identify explanations as to why boards of trustees appear to be so resistant to employing women as principals in New Zealand primary schools. This stage was informed by the following questions:

- What selection practices and procedures are boards of trustees in New Zealand primary schools implementing as they appoint principals?
- What perceptions of gender and leadership are emerging from these governing bodies, illustrated by these selection decisions?
- How has the recent managerialist and New Right policy context impacted on boards' selections in their appointment processes of educational leaders?

Reading into literature about the impact of the reforms, the policy issues and policy discourses, this initial focus broadened as it was evident that how decisions were made locally was informed by dominant discourses embedded in the reforms about education markets and managerialism. Embedded in these discourses were also associations between gender and leadership that were relevant to boards' decision-making around the principalship. Feminist discourse analysis, and in particular Bacchi's (1999, 2000) notion of 'policy as discourse', led me to reframe the research problem as one of how policy texts and discourses around schools, leadership, management and markets informed boards of trustees locally as they were making principal appointments. The paradox was that while many of the reform discourses about local school management and self-governing schools sought to increase diversity, they were often interpreted locally in highly conservative ways to the detriment of women, reproducing the principalship as a masculine activity.

The research questions then became:

- What is the problem with regard to the gender diversity representation of the principalship in New Zealand primary schools?
• What policy discourses are emerging from the New Right reforms, policies and legislation?
• How are these policy discourses being taken up by the governing bodies, and with what effect with respect to the principalship?

A Snapshot of the Context of Study

Gender is a significant factor in education employment in New Zealand (Court 1994a). Gender inequality and polarity of patterns of the distribution of women principals is a feature of the division of labour in the teaching labour market (Wylie 1997a). In primary schools, women dominate the teaching profession by representing 82 percent of the workforce, but are disproportionately under-represented in leadership, occupying only 40 percent of principal positions. Seen from another perspective, 60 percent of principals are appointed from the 18 percent male pool of the workforce (MOE 2002), thus revealing significant statistical male advantage. The other significant statistic is that 80 percent of senior management positions in primary schools (assistant and deputy principals) are held by women, indicating that there is a large pool of well qualified and experienced women who may be hitting a glass ceiling (Livingstone 1999).

The distribution of women in the principalship also reveals patterns of inequality. In the 1996 NZCER\(^1\) national survey, Wylie found that of the 35 percent of primary principals who were women, the vast majority occupied the least desirable principal positions. Women were twice as likely as men to be appointed as teaching principals to the smallest grade 1 and 2 schools, and half as likely to be appointed to higher-grade schools. Fifty-nine percent of the women appointed went to rural schools, compared to 42 percent of the men. Only 27 percent of women principals went to major city schools (Wylie 1997a p. 54). Seventy percent of the women principals were teaching principals, compared with 48 percent of the men (1997a, p. 47). The one area where it was possible to find women in larger schools as non-teaching principal was the integrated (special character) schools.
These schools were more likely to appoint women as principals than state schools – 57 percent compared to 38 percent (1997a, p. 54).

The NZ Principal’s Federation Survey (NZCER 1997) found women were more likely to gain positions in small schools, especially sole-charge schools, low SES^2 decile schools, schools with high Maori enrolments and rural schools. In a survey of workloads of primary teaching principals, commissioned by the primary teachers’ union (NZEI), Livingstone (1999) added to this national picture of distribution. Women were in the schools with a history of high principal turnover. Fifty-nine percent of schools which had had three or more principals in the previous five years, were now headed by a woman, as against 38 percent of those with only one or two principals.

This situation implies problems of injustice, discrimination and under-utilisation of talent and leadership potential, as well as undemocratic recognition of women’s rights as equal citizens. There has been less-than-expected movement in the progression of women into the principalship since the beginning of the reforms, when women represented 19 percent of the principalship in primary schools in 1987. Since 1991, when women were 77 percent of the teaching workforce but only 27 percent of principals in primary schools, there has been approximately one percent increase per year (Slyfield 1993, p. 34).

The Picot Report (1988), which the government commissioned to review education administration before the restructuring, optimistically concluded that ‘a more dynamic, flexible and diverse education system’ (10.1.8, p. 99) was needed: one where successful principals worked in collaborative team approaches with highly developed communication skills (5.3.5, p. 51). These attributes matched the feminist literature on women in educational administration of the time, which drew on the populist discourse of ‘women’s styles of leadership’ (e.g. Schmuck, Charters and Carlson 1981; Noddings 1984; Neville 1988; Shakeshaft 1989). Picot did also, however, realistically warn of the effect of devolving EEO
responsibilities to boards of trustees at the local level: ‘we were told that this could put progress in equal employment opportunities back some years unless safeguards are built into any locally delegated responsibilities’ (1988, 7.3.18, p. 71).

Unregulated Labour Markets

The restructuring legislation that followed the Picot Report did not heed this warning. The government went about introducing an employment environment that remains more unregulated than any other country with similar reforms (Wylie 2002). Total autonomy was devolved to the board on the choice of principal; the appointment panel did not include a representative from the Ministry or any of the teacher unions to monitor and moderate the process, as occurs in most other self-managing systems, such as Victoria in Australia (Townsend 1997) and Britain (Wilson 1997); no accountability was required by central government as to how the appointment decision was made; and under the present legislation there is no possibility of an unsuccessful applicant appealing an appointment. Compounding this is a problem with lack of training for board members in specific recruitment and selection practices (personal communication with New Zealand School Trustees Association), and lack of understanding of the principal’s role by many boards (Wylie 1997b). A further contributing factor is the lack of mandatory credentials or qualifications required for principals in New Zealand (Stewart 2000; Lovegrove 2001). It is not uncommon for young, inexperienced, underqualified male teachers to apply for and win principal positions (Whittall 2001).

The Gap in the Literature on Governing Bodies

There has been little research on boards of trustees’ governance role of appointing principals in the unregulated context described above. According to Earley (2003, p. 353), a decade ago the discourse was about management, whereas now, leadership as a concept is in the ascendancy and considered a crucial factor in school effectiveness, organisational
success and improvement. This is demonstrated in the rise of Educational Leadership Centres in many countries, in the number of university-run educational leadership courses and in the prominence given to research in leadership. There is also a wealth of research about leadership in the international literature (e.g. Leithwood and Duke 1999; Southworth 2002), but there is surprisingly little about governance, in spite of the decade and a half of self-managing policies in many Western countries. At two international conferences held in Britain in 2003 (BERA and BELMAS), there were several papers on leadership in schools and very few on governorship or school councils. Deem (1993, 1994), Brehony (1992, 1994) and Thody (1994) are some who have addressed governorship in Britain, while Blackmore (1995b, 1996), Townsend (1997) and Gamage (2001) have written about school councils in Australia.

In New Zealand there has been very little research on boards of trustees, with the exception of Wylie (1994, 1997a, 1997b, 1999, 2002) and Robinson (2003). In a recent School Trustees Association newsletter, trustees commented on the lack of research on board governance in New Zealand. In developing an argument that most research funding in education goes to research on student learning, teacher quality and principals’ issues, the editor of the newsletter states, ‘it is also very clear, that in the fight to maximise their research dollar, the need to research best practice governance is generally considered a significantly lower priority. And that is as true internationally as it is in New Zealand’ (NZSTA 2003).

More research is needed on the impact of governors or boards of trustees on education, as we can ill afford to ignore the influence they have. Leadership has taken over from administration, management and governance because of the commonly held belief that it is leaders who matter in terms of changing education and influencing learning (Hallinger and Heck 1997; Leithwood, Jantzi and Steinbach 1999; Southworth 2002). This may be so, but my thesis rests on the premise that it is governors or trustees who make decisions about the best leader or person for the job.
The implications of such a vital and powerful gate-keeping position in an unregulated context are profound.

In the paucity of literature around governance generally, however, there is even less about boards' employment practices. In New Zealand a small number of case studies in Masters research projects by Hague (1998), Notman (1997) and Martin (2001) open up the enquiry, by looking at principal selection and the role of the board, but overall there is little information about the variety of selection practices of principals in New Zealand, indicating a significant gap in the research literature, that this thesis aims to address.

The Argument Summarised

The thesis develops the argument that within the context determined by the New Zealand restructuring reforms of education in 1989, where boards of trustees were given sole responsibility for selecting the principal, there has been a continued marked preference for appointing male principals. The legislation which ushered in the reforms, and which impacted on employment, contributed to the production of three dominant discourses which have influenced board decision-making around the principalship and which have been interpreted by boards according to their own form of 'local logics'. The three most dominant discourses evident in the legislative framework around appointments, as I will demonstrate in chapter three, are managerialist, market, and equity/social justice discourses. The thesis illustrates how each of these discourses contributes to producing gendered preferences for the position of principal in New Zealand primary schools.
Methodological Approach

The argument draws on a feminist discourse analysis approach advocated by Carol Bacchi (1999, 2000), in order to understand both how the problem is represented in policy and how 'policy as discourse' is interpreted, adapted, rejected or even subverted as it is taken up by policy makers, administrators, principals and members of the boards and communities. The thesis considers how these players read the official and popular media discourses and interpret them locally. Each community develops a particular 'local logic' to justify decisions about the principalship that draws upon market and managerial discourses, and discourses of equity or community to explain the otherwise apparently idiosyncratic decisions that boards make about their preferred principal.

Thesis Structure and Organisation

Chapter Two explains the methodological approach used to unravel the problem represented and presents the analytical approach used to identify the dominant policy discourses relevant to the legislative framework pertaining to the reforms, and the discursive effects of these as they are taken up and interpreted by trustees. The research design and methods are also outlined in this chapter.

The next two chapters discuss the international and national literatures relevant to this study. Chapter Three provides an understanding of context by examining the historical literature of the reforms as they emerged in New Zealand, and an overview of the dominant discourses surrounding the relevant policy proposals and legislation. It describes the changing roles of central policy agencies such as the Ministry of Education and the Education Review Office, and the part the teacher unions played during the reforms. It also discusses the literature on boards of trustees and their employment relations with principals. The fourth chapter focuses on two literatures about gender issues which impact on the selection of principals:
the women and leadership literature, and literature about masculinity in
crisis as represented by boys' underachievement which has been
associated with the feminisation of the teaching force and leadership. Both
of these literatures are drawn from national and international perspectives
in an attempt to understand how women have been discursively
constructed in terms of leadership, historically through to the present day,
and why they continue to be disproportionately represented in the
principalship.

Chapters Five, Six and Seven present, analyse and discuss the research
findings, and Chapter Eight concludes the thesis by discussing the policy
implications of these findings.
CHAPTER TWO

POLICY AS DISCOURSE: A METHODOLOGICAL APPROACH

This chapter establishes and justifies the methodological approach used in the research, and the research design and methods. Ethical implications and aspects of validity and reliability are also discussed. The chapter begins with a discussion of the position of the feminist researcher, before turning to a particular feminist approach of discourse analysis as advocated by Carol Bacchi – the ‘policy-as-discourse’ approach.

Researcher Stance

At the very outset in any research undertaking it is wise practice to consider the advice of Ely, Vinz, Downing and Anzul (1997, p. 33), who advocate the need for a certain critical introspective reflection in the process of being a researcher. They speak of researchers who may be ‘driven by, passionate about, and internally knowledgeable about their research paradigm’, and while this is admirable, caution that there may also be more than a theoretical position present in their work. They claim:

We see a complex network of belief systems and positions embedding, superimposing, and undergirding any research project, and we are making a plea to be more aware of and more upfront about how these stances are accounted for in research writing (Ely et al. 1997, p. 33).

As a feminist researcher who seeks to justify how I account for my stance, I openly admit to coming to my research from a particular position with beliefs and preferences that will undoubtedly ‘shape’ and help construct
my analysis and view of the world. These include a passion for equity and a barely containable rage about inequitable and discriminating practice. As a feminist, I position women at the centre and view the world from this perspective. I have a fascination with language, theory and the implications of both with power, and at the same time acknowledge there are multiple layerings and meanings, and no single ‘truth’ (Lather 1992).

Feminist Methodological Framings

Methodology can be defined as the means by which theory and data connect, or as the glue that combines them. I found the following feminists’ definitions of methodology helpful in thinking about how I needed to generate evidence to answer my research questions. Harding (1987, p. 3) defines a methodology as ‘a theory and analysis of how research does or should proceed; it includes accounts of how the general structure of theory finds its application in particular scientific disciplines’. She explains the differences between method, methodology and epistemology. Method is a technique for gathering evidence; methodology is a theory and analysis for how research does or should proceed; and epistemology is a theory of knowledge.

Lather (1991, p. 4) defines methodology as ‘the theory of knowledge and the interpretive framework that guides a particular research project’. She claims that because of the ‘legitimation crisis’ (Habermas 1975) in orthodox science, there is a proliferation of contending and overlapping paradigms which will influence this, including positivist, interpretative, critical, and deconstruction (Lather 1992). Reinhartz (1992, p. 246) claims: ‘feminist researchers use theory in three different relations to data: to explain data, to generate theory, and to test theory.’ I found this useful in the way I have thought about and used Bacchi’s theory in this project.

There is some variance in the literature about whether there is a feminist methodology or methodologies (Harding 1987; Stacey 1988), but most agree on the following principles which are important in this research: the
centrality of gender, the rejection of subject/object separation and scientific objectivity, and the examination of ethical concerns as identified by Cook and Furnow (1986). Of the ten themes Reinharz (1992, p. 240) identifies, the following three are pertinent to this study:

- Feminist research involves an ongoing criticism of nonfeminist scholarship;
- Feminist research aims to create social change; and
- Feminist research strives to represent human diversity.

Pat Usher (1996, pp.131-134) argues that the following themes should guide the development of new approaches in feminist research:

- The acknowledgement of the pervasive influence of gender as a category of analysis and organisation (asking how meanings about gender are implicated in the questions and criteria that guide our thinking);
- The utilisation of a multiplicity of research methods; and
- The deconstruction of the theory/practice relationship. (Feminists need to deconstruct the traditional ways educators separate theory from practice, in order to move on from understanding their world, to changing it.)

Usher's view is that feminism's most important contribution to the construction of all theory and knowledge 'has been to ask that we all recast the way we understand the nature and product of knowledge' (p. 121). She defines epistemology as 'the study of how knowledge is constructed about the world, who constructs it, and what criteria they use to create meaning and methodology, in the sense used by Harding (1987), as a theoretical and conceptual framework within which research proceeds' (1996, p. 131). Along with Reinharz (1992), Usher argues that feminism is a perspective, not a method, and as such can be infiltrated into all disciplines as a means of developing innovative methods, both
qualitative and quantitative, to analyse human activity and understandings of the social world. This is the position adopted in this research.

Some of the theoretical tools of a feminist poststructural approach as defined by Kenway, Willis, Blackmore and Rennie (1994) as they argue a politics of 'hope' rather than 'despair', provide guiding principles of a useful methodological approach to my analysis of discourses and practices of struggle and resistance. They define poststructuralism as:

A term applied to a very loosely connected set of ideas about meaning, the way in which meaning is struggled over and produced, the way it circulates amongst us, the impact it has on human subjects, and finally, the connections between meaning and power. For post-structuralists, meaning is not fixed in language, in other cultural symbols or in consistent power relationships. It shifts as different linguistic, institutional, cultural and social factors come together in various ways. Meaning is influenced by and influences shifting patterns of power. And finally, it constitutes human subjectivity which is, again, regarded as shifting, many faceted and contradictory (Kenway et al. 1994, p. 189).

However, poststructuralism only becomes feminist when:

- The differences and dominations between and within femaleness and maleness are central to the analysis;
- The analysis implies a challenge to inequitable relationships of power, involving gender or sexuality;
- The logic of binary oppositions are rejected;
- The principles of humanism, the unified subject, the Enlightenment legacy, and meta-narratives are rejected;
• Power is not seen as centrally located and dispersed downwards; and
• Theories of discourses are drawn on to explore the ways in which the socio-cultural hegemonies of dominant groupings are acquired and challenged (Kenway et al. 1994, p.190).

Yates (1997) cautions against choosing various approaches to methodology just because they appear to be timeless. She argues: 'if one takes a sociocritical project in education and considers its historically changing form, including historical changes in research related to it, the question of different research methodologies is seen in a different light' (p. 490). She talks about what is being silenced when one approach is favoured over another. For instance, quantitative research may not be able to answer other questions important to the research, which a qualitative approach would. On the other hand, quantitative approaches may be 'a necessary background to framing qualitative enquiries' (1997, p. 491). In summary, different questions will need to be addressed by different research methodologies, the adequacy of the methodology is intrinsically related to the literature of a field, and the particular historical context is relevant.

Utilising qualitative and quantitative approaches provides breadth and depth to the analysis in this thesis. Statistical data derived from Ministry of Education databases and analysed over a fifteen year period on the proportion of women principals, confirmed anecdotal evidence that the problem of the gender disproportion was significant and widely spread. Statistical data derived from a survey also produced new data unavailable from other similar sources on the number of women applying for the principalship. Overall, statistical data identified a gendered division of labour in educational leadership.
The use of interviews, focus groups and case study observations facilitated in-depth investigation of the complexity and messiness of the appointment process and provided an opportunity to track how particular meta discourses were mobilised locally in the micro politics of school communities. Drawing on Foucault (1980), Bacchi (1999) and Hall and Gieben (1992), discourses here refer to historically, socially and culturally specific bodies of meaning and knowledge that exist in language, practices and representations, and which can be multiple and contradictory. Discourses produce and are produced by social practices, and so have real consequences and effects.

The research problem revolves around how policy discourses that have the intention of increased diversity (Picot 1988, 7.3.18, p. 71), can be interpreted locally by boards of trustees, often in highly conservative ways, to the detriment of women. In order to explore this proposition, the study utilised the notion of 'discourse' to provide an analytic framework that facilitates the exploration of how official policy texts and discourses are taken up, rejected and modified locally, as in the approach advocated by Luke (1995), which he, among others, have called 'critical discourse analysis'. Luke says,

A central task is to theorise and study the micropolitics of discourse, to examine actual patterns of language use with some degree of detail and explicitness, but in ways that reconnect instances of local discourse with salient political, economic, and cultural formations (1995, p. 11).

The focus of the research is therefore on the discursive practices around leadership and gender at the micro level. Discourses are produced and reproduced by the state, education bureaucracies and local communities. Some discourses are hegemonic, others marginalised, some stronger at the centre of government but weaker in their rendition locally. As a way of examining how the official policy texts and discourses are taken up,
interpreted and modified in specific locations, it was useful to apply Bacchi's approach to 'policy-as-discourse' to the material collected from the interviews. I now turn to an explanation of this approach.

**Bacchi's Approach to Policy**

Bacchi (1999, 2000) provides two useful approaches, in terms of how to conceptualise the problem of women's under-representation in the principalship and to suggest a way of conceptualizing how particular discourses inform practice. First, she looks at how problems are defined by policy, adopting a deconstruction approach, where she asks 'What's the Problem?' Second, she analyses policy in terms of discourse, and uses this to think about the effects of it in practice.

In her approach to policy analysis, Bacchi (1999) argues for the need to rethink traditional policy studies that are founded in the political rationalist view that assumes 'problems' exist out there in the world, to an approach that embraces postpositivism and involves values representation. She calls this approach 'What's the Problem?' or more specifically 'What's the Problem (represented to be)?' This approach is premised on the understanding that, unlike the conventional policy approach which suggests that 'problems' exist in the social world waiting to be addressed and solved, 'problems' do not in fact exist out there, but are created by the policy community (1999, p.199). Bacchi argues that it is necessary to adopt an analytical approach such as this to begin to understand how policy proposals are shaped. She says:

> How we perceive or think about something will affect what we think ought to be done about it...that every policy proposal contains within it an explicit or implicit diagnosis of the 'problem', which I call its problem representation. A necessary part of policy analysis hence includes identification and assessment of policy
representations, the ways in which 'problems' get represented in policy proposals (1999, p.1).

She claims it is impossible to think about the 'objects' or targets of policy as existing independently of the way they are spoken about or represented in policy proposals, because any description of an issue or problem is an interpretation, that 'holds' within it a potential intervention in the way of policy recommendations. 'The policy proposal by its very nature identifies what is of concern and what needs to change' (1999, p. 199). Her advice is to 'shift our analysis from policies as attempted “solutions” to “problems”, to policies as constituting competing interpretations or representations of political issues' (1999, p. 2).

In this social constructionism approach to policy problems, Bacchi asks what presuppositions are implied or taken for granted in the problem representation and what is left unproblematic. She utilizes a form of discourse analysis in her focus on representations or interpretations, which she defines as 'the language, concepts and categories employed to frame an issue' (1999, p. 2). She adopts Stuart Hall's definition of discourse: 'a group of statements which provide a language for talking about – i.e. a way of representing – a particular type of knowledge about a topic' (Hall 1992, cited in Bacchi, p. 39). She also adds that discourse 'refers not just to ideas or to ways of talking, but to practices with material consequences' (1999, p. 2). Policy discourses set boundaries on how meaning is shaped, in that discourses take on their own 'internal logics', incorporating and privileging some discourses and subverting others.

Thus the 'What's the Problem?' approach directs attention to problematizations rather than to problems, which Bacchi says 'are held to be inaccessible outside of the way they are problematized' (1999, p. 199). She claims there are a number of reasons why there is a need for such an analysis. She notes the limitations of current approaches to policy studies such as the way in which they take as given the 'material' for analysis, including pieces of legislation, directives and the laws passed. As
important as what governments do in making and passing legislation is what they don't do. She argues that a 'What's the Problem?' approach probes more deeply into the shape and significance assigned to a particular 'problem', such as the labelling of certain items on the political agenda as 'private' and therefore not an issue that needs investigating. A key insight of this approach is 'the need to uncover problem representations and to see where they, and by implication, where they do not, lead' (1999, p. 5). She claims 'its purpose is to create a space to consider competing constructions of issues addressed in the policy process, and the ways in which these constructions leave other issues untouched' (1999, p. 4, original emphasis).

A Two-stage Investigation

Bacchi's approach aims to uncover the frames that construct policy problems, by utilizing two stages. In stage one she advises examining what is apparent in general public or political debate, or in the specifics of policy proposals. She says:

First, proposals need to be screened for problem representations and these then need to be analysed in terms of their effects, practical and discursive...[T]he logic here is that these proposals will reveal what is represented to be the problem, because what we propose to do will suggest what we believe needs to change (1999, pp. 206-207).

As an example, she shows that the 'problem implicit' is recognised in key policy terms and discourses such as 'welfare dependency' (1999, p. 206). Examples from my research are in the terms 'disadvantaged groups' in EEO legislation, and 'failing boys' as found in populist, media and education discourses.
The second stage involves opening up the problem representations to critical analysis, teasing out the presuppositions which lodge there and speculating upon the implications of particular discursive constructions of the problem, looking also for what is unproblematised in some of those constructions (1999, p. 207). The ways in which women, and therefore women principals, in my research are discursively constructed by official policy texts, by feminist research, by women themselves, and by boards of trustees, often in quite contradictory ways, particularly in relation to disciplining boys or to managing finances in a masculinised market economy, are focuses for this stage of analysis.

Put simply then, Bacchi's model recommends:

- Identifying problem representations;
- Reflecting on their effects; and
- Probing alternative problem representations and where they might lead.

This model provides the organizing principles for analysing my research data.

What is the Problem?

Bacchi's (1999) feminist analytic approach of deconstruction helps expose the assumptions underlying 'what the problem is (represented to be)', in terms of policy and its discursive effects around principal appointments. 'What's the Problem?' views 'policy as discourse'. This notion of discourse brings together populist, official and hegemonic discourses about gender, leadership and community. There are several advantages in applying Bacchi's approach to my research problem. First, she maintains the 'What's the Problem?' approach can be applied to debates around policy issues, such as the media representations about boy's underachievement linked to a feminised education workforce, and popular portrayals of women and leadership, or it can be applied to policy documents or proposals in legislation. Second, context is also important in Bacchi's
approach to analysis, because problems are often constituted differently according to location-specific and institution-specific factors. This consideration was important to my analysis of how individual schools and their board members interpreted discourses in different locations and communities. These idiosyncratic discursive effects were a significant aspect of the findings.

Policy-as-discourse: Bacchi’s Critique

The key tool in Bacchi’s (2000) approach is how she utilises the concept of discourse. She critiques the way ‘policy as discourse’ theorists define ‘discourse’ and suggests they need to develop an understanding which suits their political purpose and intention. She claims that most of these writers have worthwhile goals, such as an agenda for change. They define discourse in ways that identify what they see to be the constraints on change, while maintaining space for activism (see, for example, Blackmore 1995; Yeatman 1998). They use discourse to demonstrate the meaning-making that goes on in policy debates — to show that change is difficult, ‘not only because reform efforts are opposed, but because the ways in which issues get represented have a number of effects that limit the impact of reform gestures’ (Bacchi 2000, p. 46). Ball (1990, p. 23) provides a compelling example of this in his analysis of the discourse around the British Education Reform Act, where he notes ‘the way in which these emergent discourses were constructed to define the field, articulate the positions and thus subtly set limits to the possibilities of education policy’.

Bacchi, citing Michalowski (1993) and Rosenau (1992) makes a distinction between literary deconstructionists (eg. Barthes 1967) and social deconstructionists (eg. Foucault 1980). The former see everything as text, which, she argues, leads to an immobilising politics of despair, while the latter emphasize the ‘processes involved’ in the creation of text and are able to challenge policy in an affirmative way because they are willing to identify sources of power.
Policy-as-discourse analysts have found discourse useful...in identifying the reasons progressive change has proved so difficult to achieve. This is due, in their view, not simply because opponents of change quash attempts at reform but because issues get represented in ways that subvert progressive intent. This point is made through drawing attention to the ways in which 'social problems' or 'policy problems' get 'created' in discourse. The premise behind a policy-as-discourse approach is that it is inappropriate to see governments as responding to 'problems' that exist 'out there' in the community. Rather 'problems' are 'created' or 'given shape' in the very policy proposals that are offered as 'responses' (Bacchi 2000, pp. 47-48).

**Policy Silences**

In this approach, Bacchi is understanding discourse as a practice as well as language. Both she and Ball (1990) imply this, when they raise the issue that it is not just what governments do but what they refuse to do, which can make inaction as important as action. Sometimes it is not just a matter of a government's refusal to act but of approaching a problem as if acting is unwarranted. This point is relevant to my thesis. As I was thinking about my research design, I was interested in exploring how policy was impacting on what was happening in board appointment practices. Bacchi's analysis alerted me to the value of 'looking for silences'. I maintain there are significant policy omissions in the field of the principalship and recruitment in New Zealand which have created spaces to allow a diversity of practices and discourses to be adopted by the groups holding power, in this case boards of trustees. These issues are discussed in more depth in later chapters.
Bacchi also maintains that the notion of policy as a discursive activity promotes consideration of the ways in which the terms of a discourse limit what can be talked about. 'Its starting point is a close analysis of items that do make the political agenda to see how the construction or representation of those issues limits what is talked about as possible or desirable, or as impossible or undesirable' (2000, p. 49). Thus Bacchi sees the purpose of a policy-as-discourse approach as bringing such silences in problematizations out into the open for discussion. Such revelations are an important part of a political process of challenge. She claims that policy-as-discourse analysts insist that discourses are plural and contradictory, that they are intent on revealing the ways in which discursive constructions of problems make change difficult, and that they believe that exposing these constructions is a useful political exercise. It marks a first step in demystification and allows for discursive reconstruction (2000, p. 50). For her, the aim is not just to see policy as a strategic and political process, but one where the policy-as-discourse approach constitutes the shape of the issues to be considered.

This approach is useful in exposing contradictory discourses underpinning competing policies and examining how these are interpreted, adapted or rejected at the local board level. These contradictions and competing constructions need to be made visible and opened up for discussion so that policy makers, women principals and board members can reconstruct alternative, socially-just solutions.

Bacchi draws attention to a tension within the policy-as-discourse position between the uses and effects of discourse. She claims that some theorists are still wedded to critical theory when they emphasize that those who use discourse hold power, while those who are affected by discourse are considered to be lacking power. Those who 'hold' power are deemed to make discourse, while those who 'lack' power are described as constituted in discourse. She believes the meaning of power implied in the policy-as-discourse position needs to be discussed, so that the tendency to identify only some groups as able 'users' can be reconsidered, just as we need to
think differently about the discursive positioning of outgroups and the way they are positioned as disempowered. As policy-as-discourse theorists, 'we need then to strike a balance between the constitutive effects, including the lived effects of discourses...and a recognition that discourses can be used to effect' (Bacchi 2000, p. 55). Discourses both constitute and are constituted by individuals as subjects and objects of discourse. That is, within the limits of policy frames (i.e. language, actions possible), individuals have the capacity to re-interpret, subvert and appropriate particular aspects of the logic of discourse.

Bacchi identifies theorists who continue to use the term 'ideology' and seem to want to be able to identify an enemy, interest or power bloc (see, for example, Loomba 1998 and McLeod 1993, cited in Bacchi 2000, p. 53), while other authors understand discourses as expressions of values, picked up via processes of socialization (eg. Hawkesworth 1988; Jenson 1988). To the latter, discourses are assumptions or predispositions or attitudes people hold. Vivian Burr (1995, p. 116) dismisses this as essentialist because it views human beings as 'value holders'. She offers instead a conceptual framework based on Potter and Wetherell's (1987) concept of 'interpretative repertoires', where discourse users (people being interviewed) have agency. Interpretative repertoires refer to the linguistic devices such as terms derived from key metaphors that people draw upon in constructing their accounts of events. They do not belong to individual people and are not located inside their heads, but are a social resource, available to all who share a language and culture, and are seen as a tool-kit from which people can assemble particular accounts or representations for their own purposes. They can draw on repertoires (discourses) from the 'tool box' available to them, to construct accounts of events and negotiate morally tenable positions for themselves (Potter and Wetherell, 1987, p. 178).

The view that policy actors implement policies in alignment with their socialization, according to poststructuralist critiques, positions individuals as the helpless 'objects' of processes of socialization. Bronwyn Davies
(1994, p. 75) says we need to distinguish between 'the humanist concept of socialization' where the vision is 'of one who essentially is', and 'the poststructuralist concept of subjectification', which is about being positioned as 'one who can or cannot speak in this way or that'. In this way Bacchi (2000, p. 54) agrees, 'subjects are positioned in relation to multiple and contradictory discourses, opening up a space for change'. Socialization, on the other hand, tends to produce subjects who can be expected to speak in only one way.

Bacchi warns that there are real people living the effects of discursive conventions and it is essential to attend to the harms they experience. We need to strike a balance, she says, between the constitutive effects of discourse, and a recognition that discourses can be used to effect. We need to spend more time theorizing this 'space for challenge'. She claims there is too much emphasis on the constraints imposed by discourse and a concentration on groups with power as the makers and users of discourse, rather than on the readers of discourses at the level of practice. In this research the groups with power could be assumed to be the policy makers. However, as Luke (1995, p. 20) suggests, as the overlapping discourses are 'articulated, rearticulated, and at times, disarticulated in particular hegemonic interests' around the principal appointment field, the power is taken up at times by boards, selection panels and even principal advisors in some cases.

The Rationale for Using Bacchi's 'Policy-as-Discourse' Position

Bacchi's approach was useful in a number of ways to help explore how policy discourses that have the intention of increased diversity can be interpreted locally, often in highly conservative ways, to the detriment of women. One of her premises is that policies produce discourses that have their own logic. These policies as they are articulated down to schools frame local discourses, but these are also adapted and reinterpreted by trustees to develop their own local logic, which is different from the official logic at national level, but which suits their purposes more ideally.
The approach allowed the use of:

- Bacchi's idea of discursive effects of policy to help explain how principals and boards were positioned, and in turn how they positioned themselves, in different ways around notions of gender and the principalship;
- This idea to analyse how discourses of the market, EEO and the community were taken up as 'interpretive repertoires' (Burr 1995, in Bacchi 2000, p. 53) and were used or 'appealed to' with particular effects (how they influence decision making, for example);
- The idea that principals and boards could take up different positionings within multiple and contradictory discourses, and that this helped explain the idiosyncratic nature of some of the findings in the study;
- Bacchi's notion of 'nesting' (which is explained later in this chapter) to identify and disentangle the layers of representations of problems. For example, in this study the outside layer is seen to be the problem of an over-centralized bureaucratic education system, which produced solutions such as the self-management reforms. These then have certain effects which need to be examined, and so on until the problem of why boards are perhaps discriminating against women is exposed; and
- The opening up for discussion, some of the omissions or silences around self-management policy as they have been played out in New Zealand over the last decade and a half, which have created problems in principal recruitment.

Limitations of Bacchi's ‘What's the Problem’? (WTP) Approach

Bacchi states that her approach of deconstructing the problematizations involved in policy is most effectively done at the policy proposal stage. This makes sense because it is at this stage that the discourses used tend to show more clearly the positions of the makers of policy and their understanding of the problems implicit, and therefore the solutions. Also policy texts themselves are often compromised and have internal
contradictions. Her approach appears to rely on text as she says it can be applied to debates around policy issues such as the media, or to policy documents or proposals in legislation. She does qualify this by saying that while the 'WTP' approach targets policy proposals, it can also be used to clarify the assumptions and implications of understandings of an issue offered by those who deny an issue 'problem' status (Bacchi 1999, p. 13).

My study is not a study of policy proposals or texts in the way Ball (1990) and Codd (1988) use discourse to analyse policy, but is more a study of the discursive effects of policy texts as they are re-constituted through dialogue, and played out in the discursive practices of boards. The analysis of texts and documentation do not feature strongly as components to be scrutinized in my research design other than to map the ways in which they produce particular dominant, often contradictory, discourses of reform around markets, management and community that are then mobilized elsewhere in the system. Policies make possible and produce particular discourses that can frequently be mobilized in specific ways in local contexts. So while there are texts, often those who use particular discourses have not actually read the texts that produced them. Yet people can speak about equity policies and what they mean for them. I look at texts in the form of EEO, Human Rights and some of the reform legislation and documentation that came out of the Ministry of Education around self-management and principal recruitment. The thesis focuses less on the production of policies, and more their discursive effects in terms of how they were taken up locally. Bacchi argues that in her approach 'there is less of a focus on "citizen" actors, on people making sense of problem-definitions in their daily lives, though this will receive some attention, and more of a focus on identifying competing interpretations...and reflecting on what follows from them' (1999, p. 13). In that sense, it provides a sense of agency.

Education as a policy field also overlaps with other policy fields such as economics and health. Issues around gender and leadership are also informed by popular discourses generated by the media (Lingard 2003;
Discourses produced by and through the media, such as discourses about masculinities in crisis, ‘failing boys’, heroic leadership and strong discipline, as well as various discourses about the role of women, are persistent and inform how local communities view school leadership. Likewise, the government also uses the media to present policy, as in the case of ‘disadvantaged and underachieving boys’ (Lingard 2003). These media generated discourses are identifiable in the research findings as the analysis unfolds.

The Research Questions

The field of educational inquiry, or sociocritical project (Yates 1997), that this research is concerned with is gender and educational leadership, and the way the recent reforms in education have impacted on this. The three research questions are:

- What is the problem with regard to the gender diversity representation of the principalship in New Zealand primary schools?
- What policy discourses are emerging from the New Right reforms, policies and legislation?
- How are these policy discourses being taken up by the governing bodies, and with what effect with respect to the principalship?

Conceptual Framework Underpinning Research Design

In order to address the research questions, or the problem of gender diversity of representation in the principalship, the research design investigated how discourses about gender, leadership and reform were mobilised at, and articulated through various levels. These briefly were at national policy level (the macro level), the school level, across New Zealand (the meso level), and at the individual local community level, in the form of case studies, (the micro level). Bacchi refers to this as the ‘nesting concept’ (1999, p. 5): an analytic technique that ‘peels back the layers’.
At the level of the central bureaucracy, policies informed closely the official discourses of individuals amongst the policy ‘élites’, in policy proposals, texts, documents and legislation. These discourses were interpreted, taken up and adapted, utilized or conceptualised in varying ways by school boards, principals and communities. In so doing they informed and were informed by the micropolitics of gender within each school community and committee. Investigating the micropolitics of gender, as Amanda Datnow (1998, p. 20) explains, 'is often difficult, as it requires digging deep into issues about which school personnel may not be very forthcoming, often for fear of the consequences if they discuss such issues publicly'. Bacchi’s ‘peeling back the layers’ technique helped to expose the micropolitics.

The notion of nesting does not mean that discourses function in a top-down, hierarchical manner. Discourses provide a language, a logic that can be recognised and mobilised to serve particular interests within boards and by particular groups. Discourses are articulated and rearticulated at each level, some more so than others (Ball 1993; Kenway et al. 1994). Ball calls this a policy-trajectory approach, where a cross-sectional rather than single-level analysis traces policy formulation, struggle and response from within the state itself, through to the various recipients of policy. He says, ‘each context consists of a number of arenas of action... each context involves struggle and compromise and ad hocery. They are loosely coupled and there is no simple one direction of flow of information between them’ (Ball 1993, p. 16). Kenway et al. (1994, p. 191) talk about ‘inter-discursive’ work and the changing of meaning that occurs ‘through the articulation of concepts in new and different ways, through their disarticulation from certain other frameworks and through their rearticulation into new frameworks’.

In the next section I describe the different educational settings that were sites for the production of discourses about school leadership, and draw
from a range of methodologies, to determine what these discourses were and what their inherent logics were.

**National Discourses and Representations of Women**

To begin this project it was important to construct an understanding of the national context that produced a particular 'problem of representation' of women and leadership. Key questions around 'what is the problem represented to be?' were sought. One representation was through analysing statistics, to determine:

- The proportion of women principals in primary schools;
- The extent of the gender shift in the principalship since the reforms began;
- The number of women applying for the principalship;
- The types of schools women are being appointed to; and
- The gendered employment patterns and career paths emerging since restructuring around the principalship, i.e. whether there is a typical progression or career path into the principalship, the ages principals are first being employed, the length of time they stay in a job, and the problem of burn-out.

This involved collecting and analysing statistical information developed from Ministry of Education databases, from which patterns of distribution could be identified. Such patterns provided a background as to understanding why particular discourses were produced by some groups and not others. Methodologically, this aspect of the project had some problems because since the reforms began in 1989, statistics have no longer been collected by central government on a number of issues. This meant that only the first two questions could be answered by accessing Ministry databases. This in itself was symbolic of the downgrading of women's representation as an issue nationally and delegation of responsibility to the local. There has also been a lack of interpretation or reporting of this raw data by the Ministry since 1989, which raises
questions about the invisibility of the problem at the official level. Statistics were obtained from other educational research documents and projects, which helped to answer the last two questions, but there were no statistics to establish the number of women applying for the principalship.

Before the reforms, the Department of Education collected statistical records on all applications for positions in education, but this no longer occurs. In the absence of a national database it became necessary to gather this data. There was a commonly held assumption that the reason for the gender disproportion was that women were not applying for the principalship. I therefore surveyed a small sample of boards, using a postal survey. A questionnaire was sent to 150 boards who had advertised in the *Education Gazette* for a principal in a six-month period during 2002 (see Appendix Two). This provided an overview of the number of women applying for the principalship, how many were shortlisted and the percentage who were appointed as principal. I also wrote an article in a widely read educational newspaper *Eduvac* (see Appendix Three), inviting women aspiring to the principalship to contact me if they wished to be interviewed by telephone about their experiences. While this produced a particular 'self-selected' cohort, it had the advantage of illustrating both favourable and unfavourable experiences.

While this broad statistical analysis indicated patterns, it had limitations in terms of providing explanations. The next stage was therefore to conduct interviews (Minichiello, Aroni & Timewell 1996). To get a sense of the national 'official' representation of the 'problem' (or non-problem), key 'élites' (Marshall and Rossman 1995) in the field of education and employment were interviewed. The purpose was to ascertain the official discourse of 'what the problem was represented to be'. It was also useful to probe their understandings of the trends and patterns that had emerged from the statistical analysis. The élites interviewed were in key positions that provided them with a national overview of the education employment situation. They were:
• Judith Aitken, recently retired Chief Executive Officer of the Education Review Office;
• Two managers from Human Resource Management in the Ministry of Education;
• The Women’s Caucus from the primary teachers’ union, NZEI; and
• An employment officer from the New Zealand School Trustees Association national office.

The Ministry of Education is involved in policy making and the Education Review Office is involved in policy evaluation. The NZEI Women’s Caucus and the NZ School Trustees Association seek to influence policy. As advocacy groups they represent their members’ interests at the national level. The Women’s Caucus of the primary teachers’ union (NZEI) keeps a ‘watchful eye’ on the effects of policy as it impacts on women teachers and informs the Ministry, and the School Trustees Association (NZSTA) supports, trains, and provides advice and guidance at a policy, legal and informal level to trustees governing schools.

Finally, a document analysis on the key sections of policy documents, legislation and relevant official texts in the field of education and employment was undertaken, in order to identify the dominant discourses, solutions and any gaps or silences. The documents analysed were:
• The State Sector Act 1988;
• The Picot Report 1988;
• The Education Act 1989;
• The Lough Report 1990;
• The Education Amendment Act 1991;
• The EEO provisions in the State Sector Amendment Act 1989; and
• Original charters and official texts sent to schools related to EEO and personnel management.

I discuss the method of document analysis later in this chapter.
The Next Articulation

Peeling back to the next level, the research project investigated school-board selection practices from across New Zealand in four regions through a series of separate focus-groups with board chairs, principals and principal advisors. The intention was to see how school boards took up and interpreted the official discourse, and whether they integrated it with the prevailing discourses about the principalship dominating their local communities, by either adapting, selecting or rejecting what best fitted their circumstances and local logics (Ball 1993; Kenway et al. 1994).

The three research questions were addressed through a series of focus-groups with board chairs, principals and principal advisors at the school level. Discussion topics and questions were developed around the issues, tensions and complexities that these three groups confronted with principal selection.

The focus-groups facilitated the identification of:

- Boards of trustees' selection procedures used in appointing principals;
- Boards of trustees' discourses around gender and leadership; and
- Boards of trustees' discourses around the market, managerialism and the principalship.

Eleven focus-groups, representing socio-economic and cultural differences from around the country, were held. Reasons for selection of a range of schools derived from earlier research. Size, location, decile rankings and ethnic populations of schools were considered important variables. Wylie's (1997a) research showed that women have a much higher chance of being appointed to small schools, to schools with high Maori and Polynesian rolls, to rural schools, and to schools with lower decile ratings (i.e. socio-economic status).

The eleven focus-groups, each of between six to ten people, were as follows:

- One focus-group of board chairs from small schools who had appointed a male principal;

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• One focus-group of these male principals;
• One focus-group of board chairs from small schools who had appointed a female principal;
• One focus-group of these women principals;
• One focus-group of board chairs from large schools who had appointed a male principal;
• One focus-group of these male principals;
• One focus-group of board chairs from large schools who had appointed a female principal;
• One focus-group of these women principals; and
• Three focus-groups of principal advisors (consultants to the boards) from three different regions of New Zealand.

The focus-group interviews were facilitated by myself and prepared questions were used in an unstructured interview approach (Taylor and Bogdan 1984) to initiate discussion. The interview techniques are discussed in the ‘Data Collection Methods’ section of this chapter. All interviews were taped and transcribed, and copies sent to those participants who wished to receive them.

The Micropolitics of Gender

It was anticipated that the interview data that emerged from the focus-groups with the boards would be variable and complex. This required a close study of boards involved in the appointment process, or recently involved in an appointment. To gain an in-depth understanding of how location, gender and community intersected in the micropolitics of everyday life in a range of institutional sites, three boards were selected for case study observation and analysis (Yin 1994). This is also discussed in the ‘Data Collection Methods’ section of this chapter. One board was about to begin the process of appointing a principal, one had recently appointed a man, and one had recently appointed a woman.
To capture difference between communities, the diversity of the communities and the decile^5 rating of the schools was taken into account in selecting the case studies. In the case of the first case study, permission was obtained to observe throughout the entire appointment process. In the other two case studies, one-to-one in-depth interviews were conducted separately with all members of the appointments committee, and the advisor to the board if one was used.

Case Study One:
The school involved in this case was a large, urban, U5^6, school with a roll of 500 students. It was a decile three school, indicating a working-class parent community. The school was about to begin the process of appointing a new principal after the present principal had indicated he was about to retire. I was given permission to attend all the meetings involved in the appointment process but was asked to be a non-participant observer. The board permitted me to tape all the meetings but we decided to seek permission of the shortlisted applicants to tape their interviews with the panel. Three of the shortlisted candidates consented, but one did not, so to ensure a fair research process I did not tape any of the interviews, but took notes instead.

I attended meetings where:

- The job description, person specification and advertisement were decided on and written;
- Candidates were shortlisted;
- Questions for interview were formulated and protocols finalised;
- Applicants were interviewed; and
- The final decision was made to appoint the principal.

An in-depth interview with the advisor to the board was also separately conducted.
Case Study Two:
The school involved in this case was a small country school (U3, between 101 and 150 children), and it was classified as a decile ten (the highest socioeconomic group). It was situated close to a city. I interviewed five members on the appointment panel, including the staff representative. There was no principal advisor to the board in this appointment.

Case Study Three:
The school involved was a mid-sized urban school (U4, between 151-300 students) in a small town. The school was classified as decile three, indicating a working-class population. I interviewed five members of the board who were on the appointment panel and the woman principal who was appointed.

Data Collection Methods

In this research project I use multiple methods to address the research questions appropriately. Reinharz (1992, p. 197) states: 'An emerging postulate for feminist research – is using a variety of methods in order to generate multifaceted information'. She also claims feminist research is driven by its subject matter, rather than its methods, and will use the best methods or clusters of methods to answer the questions it sets for itself. This multiple-method approach employed in my research design is intended to interrogate the different layers of the problem in what Bacchi (1999, p. 5) calls 'problem representations nested one within the other'. Other advantages of this approach according to Reinharz, are that 'multiple methods work to enhance understanding both by adding layers of information and by using one type of data to validate another' (1992, p. 201), and 'feminist descriptions of multi-method research express the commitment to thoroughness, the desire to be open-ended, and to take risks' (1992, p.197).
A further advantage of this method is that it addresses how location, gender, school profile and board membership interact with regard to principal selection. The meta analysis indicated clear patterns and these were explained by micro-level analysis of specific selection panels.

Data collection was through the eclectic combination of survey, one-to-one interviews, focus-group discussions, observations and case studies, reminiscent of the 'bricolage' notion (Denzin and Lincoln 1994), where multiple methods of qualitative research are used and pieced together to build a reflexive collage or montage. This is consistent with the feminist methodological approach discussed earlier, where a multiplicity of research methods is considered appropriate (Reinharz 1992; Usher 1996), and where, in Bacchi's approach (1999), it is necessary to use these methods to ascertain the discourses and discursive effects of policy. Within the quantitative approach I drew on various statistical reports, and I analysed the results of the postal survey I had implemented.

By methods, Cohen and Manion (1990) speak broadly about the range of approaches used to gather data that are to be used as a basis for inference, interpretation, explanation and prediction. According to Harding (1987, p. 2), 'A research method is a technique for (or way of proceeding in) gathering evidence'. These techniques all fall into three categories: listening to (or interrogating) informants, observing behaviour, and examining historical traces and records.

The following commentary discusses the methods, and their attributes, used in this research project: interviewing, including conversations, phone interviews and focus-group discussions; case study observations; document analysis; and surveys.

**Interviewing**

Interviewing has long been favoured by feminist qualitative methodologists as an effective method for 'getting to the essence' (Ely et al. 1997) of the
research problem, but it has also been necessary to substantiate why it is an ethically sound method, in the face of scientific objectivity. Oakley (1981) critiques the objective stance of the interviewer in traditional, positivist research, claiming it is an impossibility and not useful in feminist research. She advocates a non-hierarchical relationship between researcher and participant as well as a relationship of mutual trust, where it is even legitimate for participants to ask questions of the researcher. She also claims an advantage of feminist research is that ‘a feminist interviewing women is by definition both ‘inside’ the culture and participating in that which she is observing’ (1981, p. 57). In this claim she is privileging a subjective stance.

The literature includes many categories of interviewing, including interactive interviewing; in-depth interviewing; unstructured, semi-structured and focused interviewing; conversations; and group interviews. Each mode has appropriate uses for particular phases. Most of the interviews conducted in this project could be classed as interactive interviews, where the focus was on the interviewee and his/her experiences, and where at times the roles were relatively informal and the discussion involved shared experiences and feelings (Bogden and Biklen 1982, p. 135). There was a sharing of experiences in the focus-groups with the women principals and the boards of trustees, where I could relate to their experiences, having been on two boards in the past myself. There was less sharing of experiences with the male principals, where in Oakley’s terms I, as researcher, was ‘outside’ male culture.

*In-depth interviewing* was another feature of all the interviews carried out in this research. Minichiello et al. (1996, p. 61) define this approach as:

>`Conversation with a specific purpose – a conversation between researcher and informant focusing on the informant’s perception of self, life and experience, and expressed in his or her own words. It is the means by which the researcher can gain access to, and`
subsequently understand, the private interpretations of social reality that individuals hold. This is made public in the interview process.

The focus of these interviews was not ‘self’ or ‘life’ as such; it was boards’ or principals’ experiences of a particular event, in this case the appointment process. In the case of the policy élites, the focus was their perceptions of national trends and patterns around employment in education. It allowed me, as researcher, access to the discourses alluded to in their interpretations of social reality.

Unstructured and semi-structured (or focused interviewing) are two ways of conducting in-depth interviewing. Taylor and Bogdan (1984, p.77) define in-depth interviewing as ‘repeated face-to-face encounters between the researcher and informants directed towards understanding informants’ perspectives on their lives, experiences or situations as expressed in their own words’. This process relies on informants’ verbal accounts of social realities, placing high value on their perspective rather than privileging the researcher’s view. This in turn ensures a more egalitarian situation in terms of power between the researcher and informant. I found this method particularly useful to gain access to and understanding of the less visible reasons for boards’ decision-making. In the focus-groups this often became a process where the group challenged and questioned each other, in an attempt to elucidate meaning, and where my role was often inconsequential.

Most of my interviews used a line of questioning commonly found in focused or semi-structured interviews, where an interview guide or schedule is developed around a list of issues that have been identified from previous research and earlier interviews, ensuring progressive focusing. The ERO (2001) survey of appointment practices provided a useful starting point for my interviews with boards. As I became more adept at conducting the focus-group interviews, these may have taken on the appearance of unstructured interviews, which dispense with formal
interview schedules and rely on the social interaction between interviewer and informant to elicit information. They can take on the appearance of a normal everyday conversation, which the focus-group discussions did, but it is always a controlled conversation geared to the interviewer's research interest.

"Conversation" or "dialogue" is a feminist methodological invention that experiments with the nonauthorial voice by using multiple voices (Reinharz 1992, p. 229). In research with femocrats, Blackmore (1995) used a series of unstructured, recorded interviews in the form of 'conversations' rather than interviews, where each woman was prompted to reflect and theorise about her practice around particular themes. This approach is used frequently in feminist research (Oakley 1981; Weiler 1988; Middleton 1989; Stanley 1990; Lather 1991). This type of reflecting and theorising happened spontaneously in the women principals' focus-groups, where participants called on liberal and radical feminist discourses as they reflected on each other's stories and experiences.

The method I used most often, because of the large number of participants it allows, fits within the group interview category. This involves a group of informants engaged in conversation for the purpose of the research, using focused semi-structured or in-depth interviews. Specifically, the method is called focus-groups. These are focused interviews operating in a group format of six to twelve people, with the researcher introducing the topic for discussion and acting as a moderator or facilitator in the conversation process, encouraging participation without his or her input. From the researcher's point of view this allows 'a way of listening to people and learning from them' (Morgan 1998, p. 9).

Focus-groups allow data to be gathered more quickly and more economically than in individual interviews, and also allow informants to react to and build upon each other's ideas and comments. Disadvantages include the possibilities of 'group think', dominant members and the group setting causing discomfort to some members (Minichiello et al. 1996).
'Group think' did occur in one of the focus-groups. This was the focus-group of male principals from large schools. The schools in the region these principals came from are dominated by male principals and it is very difficult for women to win principal jobs there. The 'group think' behaviour manifested by most of the members of this focus-group was a particular form of hegemonic masculinity. I had been informed of the 'old boys' network' operating in the area, with its dominant male culture. The focus-group allowed me to observe this phenomenon first hand. The group acted as one, took ownership of the meeting and instigated a 'bloke's culture', ridiculing the subject matter, sharing 'in-jokes', jollying and teasing each other along. The only person who was made to feel discomfort was me, as the only woman in the group.

When I interrogated the tape and transcript, I realized I had worked much more actively with this group than I had done with other focus groups. On reflection it could be interpreted that I overstepped my impartial researcher stance, but as a feminist researcher I would argue that in order to have these principals address this subject matter seriously, and not continue to trivialize it, I needed to assert my position as researcher and take measures to ensure they did step out of their 'group think' role. (I felt like a teacher or mother dealing with a group of naughty boys!)

Other advantages of focus-group interviewing are raised by Krueger (1988), and outweigh the disadvantages. The flexibility to explore unanticipated issues arising out of the discussion, which the researcher may not have thought important at the design stage, is useful. This occurred in the board-chair focus-group from large urban schools, with discussion about the demise of bulk funding and the failure of the market, as evident in Chapter Seven. A further advantage is that this method increases the sample size of participants for a qualitative study by interviewing more people at one time. Because of the increased sample size, the results have high 'face validity' and the findings are believable. Matters of validity are discussed towards the end of this chapter.
One of the most unexpected advantages from this form of interviewing arose at a board-chair focus-group that had a number of Maori men taking part. Cultural protocols unexpectedly came into play as one in the group (I suspect with the highest local mana⁵) took on the role of assisting me to find answers from the rest of the group. I would ask a question and he then challenged the responses of the others in a way that I would never have done. By research standards this approach by a researcher would be seen as too coercive and threatening. The other men in the group accepted his challenging, in-depth questioning and gave extremely frank and honest responses. Their high quality deconstruction of some of the issues can be seen in the discussion in Chapter Six, for example in the dialogue about discipline and strong leadership.

Many researchers have reported how the interaction among participants of a focus-group leads to high quality data (Wilkinson 1998). Latina feminist Esther Madriz (2000) also speaks of the way her participants asked questions and challenged each other's contradictions and responses. She said she found when interviewing women of colour, that the focus-group allowed them a voice, and acted as a form of 'collective testimony'.

My experience mirrors this. The interaction made possible through the focus-group allowed these Maori men to ask and answer questions in their own cultural way, resembling the traditional speaking rights, patterns and interaction of the marae⁹ (Tauroa and Tauroa 1987). It was their decision to divulge the forthright information they did, and their decision as to how they went about this. The purpose of the focus-group mirrored that of a mini hui¹⁰ on the marae. The purpose of a hui is for the tribe to gather to discuss a problem, where protocols of shared problem-solving are seriously adhered to. These traditional practices remain as important today as they have been in the past, and are integrated into modern life, being used to solve problems from health issues to Treaty of Waitangi¹¹ land and fishery claims.
Case Study Observations

The research method chosen to closely examine and investigate board selection practices at the micro-level was case studies. The need for case studies, according to Yin (1994), arises out of the desire to understand complex social phenomena, while retaining the holistic and meaningful characteristics of real-life events. In this research it is important to study actual cases of appointment practices to determine the degree to which they exemplify some of the discursive effects and practices of the focus-group interviews. Case studies also call for 'interpretation in context', according to Cronbach (1975), which is particularly important for this research where it was found that local contexts and predispositions of board members had a significant influence on appointment decisions. There is no intention, however, to generalise from these case studies about how other boards may be making appointments, as is often cited as the rationale for using this approach (Cohen and Manion 1990). Rather, I have used two of these cases as illustrations or exemplars of the two dominant discourses that emerged from the data, and also to show the idiosyncratic practices of each board within each discourse, as in the approach Reinharz (1992, p. 174) advocates when she says:

The case study is a tool of feminist research that is used to document history and generate theory. It defies the social science convention of seeking generalizations by looking instead for specificity, exceptions, and completeness.

Merriam (1998, p. 29) defines a case study as 'a thing, a single entity, a unit around which there are boundaries'. She says she needs to be able to 'fence in' what she is going to study, and unless there is a limit to the number of people to be interviewed or a finite time for observations, then the phenomenon is not sufficiently bounded to be considered a case. This fitted my intention perfectly. I had a finite number of people to be
interviewed (the board members on the appointment panel) and a set time (the appointment period). In Merriam’s terms, my cases were ‘fenced in’.

Qualitative case studies can be characterised by special features, such as being particularistic, descriptive and heuristic (Merriam 1998). In relation to my research topic, ‘particularistic’ means that the case study focuses on a particular situation, event and phenomenon and is important for what it reveals about this. It is ‘descriptive’ in that it provides rich ‘thick’ description (Geertz 1973), and ‘heuristic’ because it can bring about new meanings or insights, or confirm what is known. These are the advantages that a case-study approach brings to this research project.

Document Analysis

The most relevant document analyses in this policy research project related to the macro-level and constituted policy documents, legislation, Ministry circulars and other official documentation related to the restructuring reforms, EEO policies, and personnel management. I found Vivien Burr’s (1995) method of analysis of discourses useful to examine these texts. She advocates re-reading the texts several times, searching for recurrent themes or for coherent sets of statements or phrases which appear to talk about or represent events in similar ways, or for words that suggest certain meanings. Once the themes have been identified, the words, terms and phrases need to be listed under each; these then suggest the operation of the different discourses. She then advocates studying the implications of these discourses, as does Bacchi (1999). Burr’s method of analysing documents and texts sits comfortably with Bacchi’s (1999) discourse analysis approach, where texts are deconstructed in order to identify what the problem is represented to be and where the dominant discourses represented in the texts are identified.

At the meso and micro-levels it was also considered useful to supplement interviewing and observation with the gathering and analysing of
documents produced in the field of enquiry, because they contribute to an increased understanding of the values and beliefs of the group studied (Marshall and Rossman 1995). Bacchi would also claim these documents indicate how the discursive effects of the wider policy field are being adapted and interpreted by boards. The main documents of this kind were gathered in the case studies from the boards of trustees. These documents consisted of school policies, procedural guidelines and written statements such as advertisements for principal positions, application packages, job descriptions, person specifications, criteria checklists and minutes of meetings. According to Hodder (1994), this information could be in the form of both records (which are official and relating to formal transactions) and documents (which are prepared for personal use and are more informal).

In practice, qualitative researchers use document or content analysis to help validate their observations and other interpretations. This entails the systematic examination of forms of communication to record patterns, and check them against the facts from the data gathered. This mode of analysis became important in this study to map out how official policy texts emerged in and through discursive practices in other locations, in ways that were different from their intention, i.e. the gap between policy and practice that I have experienced anecdotally when director of the Ministry's EEO contract in schools.

**Surveys**

A postal survey was used in this project to gather current information about the number of women applying for the principalship, because of the lack of available data in any other form. The survey was a convenient way of obtaining specific, non-complex data. It was designed to have a limited number of structured response categories, and was short and to the point (see Appendix Two), to encourage as many responses from busy board members as possible. It was sent to 150 board chairs of schools that had
advertised for a principal in the previous six months, in the major
publication the *Education Gazette*. My aim was to obtain a small amount
of information from a large number of respondents, in order to make
inferences about a large group of people from data drawn from a relatively
small number of individuals from that group (Marshall and Rossman 1999).

**Analysis**

There were two sets of data collected in the research that required to be
analysed in different ways. The quantitative data from the various
databases and the survey were counted, measured and analysed statistically, largely using percentages so that comparisons could be
extrapolated between different years or between groups of subjects. This
was relatively straightforward. The more complex analysis derived from
the qualitative data produced in the focus-group interviews and the case
studies.

These were analysed initially by reading, re-reading and thematically
categorising transcripts, then working through the many categories that
emerged to identify major issues or block-themes which brought together
the many sub-themes. Alongside this I did a document analysis of the
discourse analysis, which is based on the work of Michel Foucault, I
related these to the major themes from the interviews. Three dominant
discourses emerged from both sources. These were discourses of the
market, discourses of managerialism and discourses of gender, equity and
social justice, some more hegemonic than others.

This analysis proceeded to show how these ‘large scale social discourses
are systematically (or, for that matter, unsystematically) manifest in
everyday talk in local sites’; something Luke claims many educational
analyses have difficulty showing (1995, p. 11). Using the notion of ‘local
logics’ that came into play during the process of selecting a principal, the
analysis demonstrates how trustees call upon sometimes conflicting and contradictory discourses when making decisions about who best fits their local community, context and location of school. 'Local logics' inform the discourses rationalising what is meant by 'community fit' or 'fitness for this school' (Morgan 1986) in any one site. The analysis uncovers how trustees call simultaneously on contradictory discourses of gender (about women in leadership and populist media discourses such as underachieving boys), as well as discourses of the market (choice and entrepreneurship) or managerialism (effective and masculine leadership), that had a particular 'local logic'.

This analytical approach is contingent upon Luke's (1995, p. 13) definition of text 'as language in use...any instance of written and spoken language that has coherence and coded meanings'. Luke makes the connection from text to discourse by stating that:

Discourse, then, consists of recurrent statements and wordings across texts, [which] together mark out identifiable systems of meaning and fields of knowledge and belief that, in turn, are tied to ways of knowing, believing, and categorizing the world and modes of action (1995, p. 15).

Luke claims that one of the advantages of utilising critical discourse analysis is to make transparent the way we can trace particular discourses to see how they 'construct and instantiate particular institutional relations of power and social formations' (1995, p. 20). In this sense discourse has a hegemonic function by establishing itself as a form of common sense, and he maintains the job of discourse analysis is to disarticulate and critique texts as a way of disrupting common sense. He is similar in intention to Bacchi when he states:

Part of that disarticulation can involve the analysis of whose material interests particular texts and discourse
might serve, how that articulation works on readers and listeners, and strategies for reinflecting and rearticulating these discourses in everyday life (1995, p. 20).

**Trustworthiness and Validity**

An important part of doing qualitative research is ensuring that the research is believable and trustworthy (Merriam 1998). As understanding is the main goal in qualitative research, how this is judged trustworthy is different from a positivist view. Trustworthiness is concerned with how the findings and interpretations of those findings in qualitative research actually reflect what was there (Merriam 1998). Luke (1995, pp. 40-41) maintains the strength of using a critical discourse analysis is in its capacity to show the power relations of apparently mundane texts and everyday talk, whether in a policy statement or conversation. He claims there is 'no space outside of discourse' and it is impossible to write about mind and behaviour, belief and value, and policy and practice without a social analysis of language. In his view, understanding and trustworthiness in educational research demands a critical sociological approach to discourse in postmodern conditions.

The information-collection techniques used in a qualitative approach help establish internal validity. Researcher self-monitoring and checking back with participants to establish whether the interpretation matches their perceived reality help to ensure this (Goetz and LeCompte 1984; Lincoln and Guba 1985). This was done whenever clarification was needed. Validity can be obtained from the subjects themselves by sending them a draft of the findings chapter, according to Sandelowski (1986). Because of the large number of participants in the project, the findings chapters were considered to be too highly aggregated and non-specific for each of the focus-groups to recognise their input, so a report was sent to each of them inviting them to comment on the summary of the main findings from their interview. Eisner (1998) argues the criteria to assess research should be
guided by the features of the work itself, placing responsibility for critiquing rigour on the end-user. In the year following the analysis of the data I presented nine papers at five seminars and four international conferences in Scotland, England, Australia and New Zealand to assess exactly this point. The feedback from each of these groups endorsed my analysis and findings by speaking of similarities, and differences, in their experiences.

Eisner also argues that in many cases it is not possible to assess qualitative research by the traditional tests of validity and reliability. Finding three examples, i.e. triangulation, to back an assertion is not enough. Richardson (1994, p. 522) agrees for different reasons. She says, ‘in postmodernist mixed-genre texts, we do not triangulate; we crystallize’. She argues that most often there is no fixed reality to triangulate, and that there are often more than ‘three sides from which to approach the world’. This is where I found working with focus-groups reassuring. Their collective testimony added validity to the interpretation of issues after a process of discussion, challenging points of view, argument and/or mutual assent. It was never the sole task of the researcher to interpret what was said. Shared interpretation becomes part of the discussion process in the focus-group, suggesting it has its own internal validity mechanisms.

To return to Eisner’s key principle of rigour, one could ask what rigour looks like. According to Meade (2000), the criteria include:

- The philosophic position of the researcher is made clear;
- The theoretical constructs and units of analysis being worked with are identified;
- The nature and extent of the sample is described, and justified;
- The arguments are based on data and are logical;
• There is sufficient evidence gathered, e.g. from triangulation where the sample is small;
• The standards of judgement are vigorously assessed by others in the study and generalisations to populations beyond those in the study are not attempted; and
• The findings are published.

Lather (1988) endorses Meade’s first criteria by warning that research designs with good intentions are no guarantees about good outcomes. To ensure validity she insists we must reflect on how our value commitments insert themselves into our work and how our own understandings need to be critically examined so that we are aware of our own contradictions and tensions. Alvesson and Due Billing (1997) see the methodological difficulties of attempting to produce robust and unquestionable research results from a subject area involving gender relations and dynamics, with its elusive and hidden nature. They claim that the major contribution of gender studies is to value and ‘be open to the ambiguities involved and the historical and situated character of the empirical object as well as of the constructed and interpreted character of so-called data’ (1997, p.11).

St. Pierre (1997, p. 184) critiques the notion that ‘there is some correct interpretation out there that the researcher can reproduce and that members and peers can recognise and verify’, something she calls suspect in postpositive research. Yet she has found the different responses from colleagues, mentors, peer debriefers, friends, family, seminar and conference members, participants, and so on have all contributed to ‘move me out of the self-evidence of my work and into its absences and give me the gift of different language and practice with which to trouble my commonsense understanding of the world’ (1997, p.185). However, as she argues, this ‘response data’ is hardly ever acknowledged in the research process, even though it may have significantly reconstructed our interpretation. She maintains it needs to be included, recorded and examined (ethically and otherwise) in the light of
how it helps us map the world and produce knowledge. As a novice researcher, I would add 'supervisor' to St. Pierre's list of 'response data' contributors, and fully acknowledge the contribution made by this key person to reconstructing my interpretation of the world.

Summary

This chapter has outlined and justified Bacchi's (1999, 2000) methodological approach adopted in this research project, and explained how the research design and methods fit her model. The ethical implications and aspects of validity and reliability are considered in relation to feminist research. To recap on Bacchi's model as an appropriate way of moving forward, she recommends first identifying problem representations, then reflecting on their effects, and finally probing alternative problem representations and where they might lead. This model provides the structure and organising principles for the remainder of the thesis. The first stage of identifying the problem representation occurs with her 'policy-as-discourse' approach of analysing policy and legislative documents relevant to the reform literature in Chapter Three, and the gender discourses that emerge from the women and leadership and masculinity in crisis literatures in Chapter Four. Chapter Five explores the macro national representations of 'the problem'; Chapters Six and Seven reflect on the discursive effects of the dominant discourses identified in the policy and leadership literatures at the meso and micro levels; and Chapter Eight outlines alternative problem representations, conclusions and policy recommendations.
CHAPTER THREE
HISTORY AND CONTEXT

Introduction

The problem of the gender disproportion in educational leadership is as significant today as it was when it first emerged from the mists of male monopoly and was made visible by feminist research pioneers Carole Shakeshaft and Patricia Schmuck. The problem is not so much a matter of numbers, because there are more women in leadership roles today than there were in the past. Rather it is a matter of the slow rate at which those numbers are growing. Elsewhere in education in New Zealand change is occurring rapidly, but in this area change is barely noticeable. The last decade and a half of reforms in New Zealand education have seen some significant and far-reaching changes, while the rate of progress of women becoming principals has increased at only approximately one percent per year. At this rate it will take forty more years before a gender balance is achieved in the principalship. In this thesis I argue that the discursive effects of the reforms in New Zealand have contributed to the continuation of this slow rate of change. It is therefore to this context, out of which particular discourses emerged, that I now turn, and to the specific literature of the educational reforms to illustrate this.

It is important to review both the international and national literature of the period since the mid 1980s, to examine how and why these reforms were initiated, as well as by whom, and to analyse the dominant discourses inherent in the relevant documentation and debates associated with the reforms. I utilise the document analysis method discussed in the last chapter to identify dominant discourses. The first part of this chapter looks at what has happened in New Zealand in this period, in the light of wider international political and economic situations, and the discourses produced within the documentation and legislation introduced in the reform period.
The second section provides an overview of the change in role of the central agencies in education that occurred as the reforms were initiated. These agencies include the Ministry of Education, the Education Review Office and the teacher unions. The third section discusses the Equal Employment Opportunities legislation introduced during this time and the discourses produced within it. The fourth and final section of this chapter describes the role of the board of trustees and the context in which principal selection occurs. In particular, the employer roles and functions of boards are described. The chapter concludes with a discussion of the implications for the employment of principals since the reforms.

History of the Education Reforms

Table 1: Chronological Time Line

<table>
<thead>
<tr>
<th>Government (Years)</th>
<th>Prime Minister (Minister of Education)</th>
<th>Key Events, Policy and Legislation</th>
</tr>
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<tbody>
<tr>
<td>LABOUR (1984 - 87)</td>
<td>Lange (Russell Marshall)</td>
<td>1987 – Picot Taskforce set up</td>
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<td></td>
<td></td>
<td>1989 – Education Act</td>
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<tr>
<td></td>
<td></td>
<td>May '89 – First board of trustees elections</td>
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<tr>
<td></td>
<td></td>
<td>1989 – State Sector Amendment Act</td>
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<tr>
<td></td>
<td></td>
<td>1990 – Lough Report - 'Today's Schools'</td>
</tr>
<tr>
<td>NATIONAL (1990 – 96)</td>
<td>Bolger (Lockwood Smith)</td>
<td>1991 – Education Amendment Act</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1991 – Employment Contracts Act</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1992 – Bulk funding introduced</td>
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<tr>
<td></td>
<td></td>
<td>1992 – Judith Aitken appointed CEO - ERO</td>
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<tr>
<td></td>
<td></td>
<td>1998 – Employment Contracts settlement</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2000 – Employment Relations Act</td>
</tr>
</tbody>
</table>
The above timeline illustrates a chronology of the reforms in education from 1984 to 2003, and is based in part on Butterworth and Butterworth’s (1998, pp. 272-279) timeline.

The Primary Education System in New Zealand Prior to the Reforms

Since 1877, when the Education Act made education free, compulsory and secular, New Zealand had experienced a national education system which was administered eventually by a large centralised structure. By 1984, the Department of Education had 1,700 employees, and ten regional boards of education, who were charged with, among other things, appointing principals and teachers in their region (Fiske and Ladd 2000). All funding for school properties, maintenance, resources and teachers’ salaries were controlled and allocated by the Department. Quality of education was assessed by a team of inspectors who moved from school to school grading and disciplining teachers, as well as organising professional development for them.

Prior to 1988 there had been considerable disquiet and frustration with the role and function of the centralised and overly bureaucratic administrative system of education in New Zealand for a number of years. There was a long-standing philosophical preference for local autonomy that was evident in the many reviews that were carried out on education such as the Royal Commission on Education, 1912; the Atmore Parliamentary Committee, 1930; and the Education Development Conference, 1974. The Currie Report (1962), appointed to review the entire education system in 1960, had recommended a move towards more local control. It recommended:

That local interest in education should be preserved and strengthened by the further development of local institutions;
That a balance should be kept between central and local power; and
That delegation of authority to the local institutions should be as great as possible under a system of central financing (Currie 1962, p. 130).

The Reforms and the Education System that Evolved

Education reform was just one part of wider public sector reforms introduced into New Zealand in the mid 1980s by a 'relatively small, close knit group of politicians, businessmen, bankers and bureaucrats...at the nexus of government, the Treasury, State Services Commission, the Reserve Bank and the Business Roundtable' (Peters, Marshall & Massey 1994, p. 266). From 1985 to 1990 a majority group within Cabinet, led by Minister of Finance Roger Douglas, restructured the New Zealand economy and public service along principles of market competition (Belich 2001). The reform model they introduced in the public service was based on New Public Management (Boston, Martin, Pallot & Walsh 1996), where a competitive market economy replaced many of the institutional practices of the existing welfare state (Codd, Harker & Nash 1990). The reformers argued that a proliferation of governmental bureaucracies had led to overspending and a national economic crisis, and that improvement of the public sector necessitated increased efficiency, accountability and transparency (Boston et al. 1996).

The Picot Taskforce
In 1987 and 1988 a decision was made to investigate the education administration system once again, and three taskforces were set up to review the three education sectors. The Picot Taskforce Committee was established to review the compulsory education administration sector. The central administrative body - the Department of Education and its ten regional boards, as mentioned - had been described by a series of official
commissions previously as 'top-heavy, ponderous and unresponsive' (Fiske and Ladd 2000, p. 32). Schools were dependent on the Department for all resourcing, including staffing, and there were concerns about bureaucratic inefficiencies. An example is cited in the Picot Report of a ludicrous staffing decision made by the Department:

Not only are there disincentives for efficiency: in some cases, successful performance may actually be punished. We were told of a case where a principal - through good teaching and management practices - attracted enough pupils to turn a two-teacher school into a three-teacher school. The principal, however, does not have the personal grading to hold the principalship of a three-teacher school, and so may have to move on (Picot 1988, sec. 3.5.13).

This convinced Brian Picot, the chair of the taskforce committee, that a system that could punish success and reward failure needed to be changed. Picot loathed poor performance being tolerated and he believed principals needed to control their own budgets and have autonomous responsibility for staff appointments before there could be any true accountability for their performance (Butterworth and Butterworth 1998).

Russell Marshall, Minister of Education in 1987, had decided to set up the Picot Taskforce in an effort to pre-empt a Treasury initiative to set up its own review of the education system. The taskforce was made up of people from both education and business. The chair, Brian Picot, described himself 'as a grocer', but according to Prime Minister David Lange 'he was a successful businessman with a social conscience', who had built up a giant supermarket chain (Butterworth and Butterworth 1998, p. 66). The Treasury representative, Simon Smelt, was seconded to the taskforce as an advisor. He was an English economist specialising in labour market issues and pushed a managerialist line. Other members included educational lay people and academics. One such academic,
Peter Ramsay, an Associate Professor of Education, was a proponent of the collaborative, partnership model of management (Ramsay 1993).

The taskforce also advertised for public submissions and received over 700, most of which came from professional interest groups and not the general public. While none argued for maintaining the status quo, neither was there an expectation of radical change (Butterworth and Butterworth 1996). A considerable quantity of material that guided the taskforce came from overseas, namely the United Kingdom, the OECD, Australia and the United States.

State Sector Act 1988
The State Sector Act was introduced into legislation at the same time as the Picot taskforce was meeting. The Act legislated for a corporate model of management in the core state sector, replacing departmental heads with chief executive officers (CEOs) and instituting contractual employment relations. It applied to all state services with the exception of compulsory education, which the Prime Minister David Lange saw as different from the rest of the state sector. The Act also assigned the State Services Commission the role of the State’s human resource manager, promoting accountability and efficiency through output-based accounting and performance pay (Jesson 1999).

Education Act 1989
The Education Act embedded the recommendations of the Picot Report (1988) into legislation as they appeared in the form of the policy document ‘Tomorrow’s Schools’. The Act also replaced the former Education Department and regional boards with the Ministry of Education and the Education Review Office.

Lough Report 1990
The Lough Committee was set up in December 1989 to review the effectiveness of the changeover from the old order to Tomorrow’s Schools.
Its chair, Noel Lough, was an ex-Secretary of Treasury and its report, 'Today's Schools', produced in 1990, recommended that the compulsory school sector be brought into line with the public sector, that boards of trustees be the employer of the principal and that the principal act as the CEO managing the school.

Education Amendment Act 1991
With the change of government in 1990 and National's Lockwood Smith as Minister of Education, the first change brought about by this Act was the decision to abolish enrolment zones and to give parents the right to choose the school that their child would attend. This meant that students were no longer guaranteed a place at their local school. Oversubscribed schools were given the right, after 1991, to create their own criteria for selecting students, rather than having to ballot amongst them, as was the case from 1989 to 1991.

Dominant Discourses Evident in the Policy Shifts of Restructuring

The restructuring of school administration was implemented at a time in New Zealand of economic crisis and during a neo-liberal political phase with Right Wing market-force thinking underlying most government policies: an ideology Codd (1998) has since referred to as 'economic rationalism', a term originally coined by Pusey (1991). 'It was the era of the grand systemic restructure', according to Macpherson (1987) (in Thrupp 1999, p. 223), characterised by downsizing, deregulation, competition and efficiency. In 1984, when the Labour Government was elected after a decade out of power, Treasury had immediately published its social policy agenda in the document 'Economic Management' (Treasury 1984). This was four years before the Picot Taskforce, appointed to review the administration of public education in New Zealand, had begun work on its report 'Administering for Excellence' (Picot 1988).
Treasury's agenda included the neo-liberal assumption that the market would determine efficient and effective services, and as such:

Excellence in schooling services would naturally occur when suppliers (i.e., individual schools) were required through the market mechanism to meet the articulate and price-sensitive demands of consumers while less than adequate schools would either reform themselves and come "up to standard" or go out of business (Macpherson 1987, in Thrupp 1999, p. 9).

The assumption underlying this, that educational competition will improve student performance, is flawed, as Elmore (1987) and Cohen (1995) (both cited in Levin 2001, p. 27) point out. What teachers and students do in classrooms as well as factors outside of the classroom such as family resources are what affect student performance, not administrative changes to governing and managing schools. Assessment guru Lester Flockton (1999), claimed that there is no evidence in New Zealand or overseas that establishes a direct or predictable link between school management reform and changes in student learning.

Discourses Underpinning the New Zealand Model of New Public Management (NZNPM)

The policies and legislation that arose in the late 80s and early 90s emerged out of the distinctive New Zealand model of new public management, which differed in unique ways from similar public sector reforms operating in Britain, Australia and the United States (Boston et al. 1996). The New Zealand model of New Public Management (NZNPM) had its theoretical underpinnings in Treasury's public sector restructuring policy, published under the title "Government Management" in 1987, and was shaped by certain bodies of economic and administrative theory. Particularly influential were 'public choice theory, organisational
economics — especially agency theory and transaction-cost economics (TCE) — and managerialism or the new public management (NPM)' (Boston et al. 1996, p. 16). Boston et al. say 'although public choice theory and managerialism have influenced policy developments in many other countries since the early 1980s, the same is less true of organisational economics' (1996, p. 17), which is where New Zealand’s reforms differ from those countries.

Public Choice Theory
An assumption underlying public choice theory is the belief that all human behaviour is dominated by self-interest in the economic marketplace. It is therefore believed that as professionals and bureaucrats are entirely self-interested, they will endeavour to maximise their individual gains unless they are constrained by market mechanisms such as competition. In their brief to the incoming government in 1984, Treasury officials claimed that 'without the constraints of the market there are opportunities for public service providers to maximise their own interests, rather than to maximise the interests of their clients' (The Treasury 1984, p. 257).

Public choice theorists are sceptical of ethical concepts related to the common good and societal well-being such as 'public spirit' and 'public service', because they believe such concepts lack relevance or could too easily be used 'to give legitimacy to the demands of sectional interest groups' (Boston et al. 1996, p. 18). This was Treasury’s motive for limiting collective contracts and the power of trade unions. Because of their fears of bureaucratic capture and political abuse of power, public choice theorists have endorsed minimising the role of the state and curbing the function of government agencies by making the services of the state as contestable as possible. For the same reasons there was a drive to separate the provision of policy advice from policy implementation (p. 27), and hence in the reforms, the disestablishment of the Education Boards and the reinstatement of a Ministry of Education which was to provide policy advice alone.
Agency Theory

In their summary of agency theory, Boston and his colleagues (1996, p. 18) point out that it 'rests on the notion that social and political life can be understood as a series of 'contracts' (or agreed relationships) in which one party, referred to as the principal, enters into exchanges with another party, referred to as the agent'. The agent undertakes to perform tasks on behalf of the principal for an agreed upon reward. The principal may lack skills, expertise or specialised knowledge to perform a task, but whatever the reason, agency theorists believe efficiencies will result from this division of labour based on specialisation. The link to economics is that agency theory was initially applied to problems arising from the separation of ownership and control in firms, especially in ensuring managers acted in the interests of shareholders.

Agency theory, like public choice theory, assumes individuals are self-interested and that the interests of agents and principals are bound to conflict. Consequently the contract is used as a mechanism to govern and keep control of the opportunism and self-interested behaviour of agents of the State. It is concerned with the contract for labour and the exchange of services and thus focuses on the selection and motivation of agents. Agency theory influenced thinking on matters relating to employment relations, incentive structures, remuneration systems and performance management, contributing to the move to fixed-term individual employment contracts. The Employment Contracts Act 1991, which tied accountability to performance standards and performance pay as reward structures, was a direct outcome of agency theory.

The management of many principal–agent relationships is complicated by incomplete or asymmetrical information, especially in pre-contract situations where agents have access to information that principals do not, and where there is an assumption that they will exploit this situation to their advantage. One particular kind of information advantage that applies to this thesis is known as adverse selection. This is where some of the information that a principal wants to know about an agent is difficult to
observe, as in the case of choosing people to fill job vacancies. Crucial aspects such as the applicant's (the agent's) ability and character will be unknown to the employer (the principal), which gives the agent an information advantage over the principal. Because the employer cannot for certain know each applicant's 'true type' and cannot be sure of choosing the best person for the job they risk making an adverse selection (Boston et al. 1996, p. 20).

Transaction-Cost Economics
Transaction-cost economics (TCE) relates to agency theory by dealing with the best governance structures for various kinds of transactions, particularly the organising of the production and exchange of goods and services (Boston et al. 1996, p. 21). So while TCE is concerned with the governance of personnel and motivational issues, its central focus is the exchange of physical goods in the form of cost-effective transaction costs for the planning, adapting and monitoring of the completion of tasks. There are transaction costs arising from attempts to prevent transaction failures, including drafting, negotiating and safeguarding a contract, and there are those costs arising from altering a contract to correct misalignments, costs of setting up and maintaining governance structures, and the costs of bonding to guarantee contractual commitments. The assumptions about human behaviour underlying TCE are similar to agency theory. They assume opportunism or self-interest on the part of agents and principals, whereby parties to a contract may be unreliable, engaging in cheating, deceptive and promise-breaking behaviours.

TCE is concerned with the amount of risk involved in a transaction and the costs involved in minimising or safeguarding that risk. If the degree of risk or uncertainty, as in the case of information asymmetries, is too difficult to assess because of the limitations of 'bounded rationality' (a notion about human capacity to know all possible information and contingencies to make optimal decisions), it is going to be extremely costly to monitor that transaction effectively. Where there is high risk or uncertainty and high transaction costs, direct or 'in-house provision' is likely to be more efficient.
than using classical contracts. This is because in-house provision 'reduces the need to specify and negotiate in advance all the possible, often complex, contingencies that might arise during a contract period. Instead, the parties can work things out in a relatively informal, flexible and *ad hoc* manner as new situations arise' (Boston et al. 1996, p. 24).

**Managerialism and the New Public Management**

Central to the NZNPM model is a form of new managerialism, which is not a theory but a set of techniques, strategies and principles based on an assumption that "management" is a generic instrumental activity which can be applied to both public and private business (Painter, in Boston et al. 1996, p. 25). The main features of the New Public Management according to Boston and his colleagues (1996, p. 26) are:

- From the management standpoint, public and private organisations should be managed on the same basis;
- A shift from process accountability to accountability for results (i.e. output measures and performance targets);
- A new emphasis on generic management skills; less on policy;
- Devolution of management control along with improved reporting, monitoring and accountability mechanisms;
- Disaggregation of large bureaucratic structures into quasi-autonomous agencies;
- A preference for private ownership and the contracting out of most publicly funded services;
- A shift to classical modes of contracting (i.e. to short term tightly specified contracts);
- The imitation of certain private sector management practices such as short term labour contracts, strategic plans, performance agreements, mission statements, performance-linked remuneration systems, and a concern for the corporate image;
- A preference for monetary incentives over ethics, ethos and status incentives; and
A stress on cost-cutting, efficiency and cutback management.

New managerialism is not new, but can be traced back to a narrow scientific approach, based on Taylorist principles (Taylor, 1911). These show they can be applied to the management of any organisation to improve efficiency and effectiveness. Boston et al. believe that what is new about New Public Management is 'the way in which these ideas have been combined, the manner of their implementation and the vigour with which they have been pursued' (1996, p. 26).

In its present form this kind of managerialism has become obsessed with the notion of 'quality', according to Codd (1999, p. 47), which he says 'has become a powerful metaphor for new forms of managerial control'. Hence managerial effectiveness is seen in the NZNPM as the key to school improvement, and the school principal as pivotal in that relationship.

Discourses of managerialism and marketisation emerged as dominant discourses in the raft of legislation and policies that came out of the public sector reforms. As the following discourse analysis of these policies and legislation reveals, a particular language and framework was set up which was then mobilised through discourse.

The State Sector Act 1988

Politicians picked up Treasury recommendations and managed to embed its public sector restructuring policy into legislation in 1988, in the State Sector Act. The main features of the Act relevant to this thesis concern the Chief Executive Officer role, which was to significantly change the role of principals in schools after 1989. In Part 7 of the Act, these are:

77 i.d. (1) Every chief executive shall be appointed for a term of not more than 5 years.
77 E (1) May from time to time appoint such employees (including acting or temporary or casual or
relieving employees) as the employer thinks necessary for the efficient exercise of the functions, duties and powers of the institution (Government 1988, pp. 44, 46).

The first statement indicated the introduction of contractual employment relations which are common practice in business or market-focused organisations, but were not present in the public service until this time, while the second statement sets the scene for managerialist practices. As Martin (1990, p. 126) comments:

Chief executives are the employers of staff (independent of ministerial control) and conditions are negotiated separately with employers of each department in terms of the Labour Relations Act 1987. The State Services Commission was previously the employing authority as well as the employer of all public servants; its role, while still significant, is secondary to that of chief executives.

Managerial and market discourses are evident in this legislation with the introduction of new forms of management control, but while tertiary education and the rest of the public sector were required under State Sector Act legislation in 1988 to appoint a Chief Executive Officer on limited contract, who was then responsible and accountable for employing all other staff, primary and secondary education were initially exempt from this requirement. As will be seen, this exemption did not last long.

The Picot taskforce grappled with two contradictory philosophic viewpoints about how education should be administered (Ramsay 1993). One viewpoint was influenced by the managerialist discourse which came directly from the New Public Management model inherent in the State
Sector Act. The Picot Report advocated clear managerial principles for the new central agencies, the Ministry of Education and the Education Review Office, that were to be established to replace the old Department of Education.

1.2.9 Good management practices are essential if the administration of education is to be efficient and effective. That means that those working in the system must have detailed and clear objectives, control over the resources needed to carry out the objectives, and no overlapping lines of responsibility. They must also be accountable for the decisions they make.

1.2.11 The government's main functions are to decide upon national objectives, to establish funding priorities, to review and audit institutions' performance in the light of national objectives, and to manage the property owned by the education system (Picot 1988, p. 5).

By splitting the former Department into separate agencies, the principle of separating policy advice from delivery and regulatory functions was achieved, and accountability made more robust.

However, the taskforce was much more ambivalent about how schools should be managed, because of the second viewpoint which advocated the democratic-populist discourse (Fiske and Ladd 2000) of a partnership concept of control, between lay people in the community and professionals in the school. This had come out of previous reviews such as the Currie Report (1962). In the Picot Report the democratic-populist discourse of partnership and community was evident in statements such as:

1.2.14 What is required is a system which will allow individual institutions to respond to the specific needs...
of their community and which has clear lines of control and responsibility. All learning institutions should be provided with the funds and information to enable them to meet the national objectives of the education system, while having control over how they use these resources. The intention is to form a partnership between the community, the learning institution and the government which will reinforce the mutual interests and co-operation that should inform our most important national endeavour (1988, p. 6, my emphasis).

5.3.5. The research tells us that the most successful principals are those who have developed team management strategies. Whatever system is developed, the collaborative relationship between principal and staff must be protected and enhanced...the teachers and the principal participate regularly in reviewing the quality of the institution's educational performance. The process is a collaborative one (1988, p. 52, my emphases).

These opposing and contradictory discourses of managerialism and partnership were apparent in the tensions and ambivalence that resulted from the recommendations of the Picot Report in 1988, which were to lead to further political wrangling as each interest group strove to strengthen its position in subsequent legislation.

The Education Act 1989
The same tension between managerialism and partnership is also apparent in the Education Act of 1989, which legislated for the new system of ‘Tomorrow’s Schools’ (Lange 1988), which was the government policy paper introducing the educational reforms. Clause 75 talks about boards
of trustees having control in management matters, indicating partnership of school administration with the state, while clause 76 implies managerialist intent when it talks about the principal as Chief Executive Officer with solo control of day-to-day administration matters:

75. Boards to control management of schools - Except to the extent that any enactment or the general law of New Zealand provides otherwise, a school's Board has complete discretion to control the management of the school as it thinks fit.

76. Principals - (1) A school's principal is the Board's chief executive in relation to the school's control and management.

(2) Except to the extent that any enactment, or the general law of New Zealand, provides otherwise, the principal -
(a) Shall comply with the Board's general policy directions; and
(b) Subject to paragraph (a) of this subsection, has complete discretion to manage as the principal thinks fit the school's day to day administration (Parliament 1989, p. 46).

The Act also clearly extended existing secondary school board employer power to primary and intermediate boards in employment matters, which is significant in this thesis:

65. Staff - (1) Subject to subsections (2) and (3) of this section, a board may from time to time, in accordance with the State Sector Act 1988, appoint, suspend, and dismiss staff (1989, p. 41).
On the one hand the notion of self-managing schools, embedded in the Education Act, gave clear messages of devolution, efficiency, cost effectiveness, accountability, responsiveness to consumer demands and autonomy, all of which sat comfortably with the dominant managerialist and market discourses of the State Sector Act and neo-liberal theories of choice and competition. On the other hand the discourses of partnership and collaboration and the implication of shared control within the board between professionals and lay members, expressed in the following quotation from the Minister of Education who instigated the Education Act, did not sit so well with logic of the market and managerialist discourses:

The running of the institution will be a partnership between the professionals and the particular community in which it is located. The mechanism for such a partnership will be a board of trustees (Lange 1988, p. 1).

The first ten years of the reforms were a confusing time for boards and principals as they grappled with the contradictions about governance and management and the responsibilities of partnership and managerialist control (Ramsay 1993; Rae 1997; Wylie 1999). In terms of employment however, the situation was much more straightforward with boards having autonomous control over the choice of principal.

The shifting discourses during the reforms have been described by Rae (1997) in the following way. Up to 1990 the discourse was of effectiveness, efficiency, economy and equity underpinned by accountability, but post 1990, it shifted to achievement, choice, enterprise and competitive advantage. The Lough Report in 1990 pronounced the beginnings of that shift.
As the decade of the nineties progressed, the New Right agenda increasingly became more overt through managerialist and market discourses which began to manifest in adjustments to the 1989 education and employment policy. Within four months of 'Tomorrow's Schools' being instituted, Treasury and the State Services Commission were pushing for a review of the reforms, concerned they were not working according to their New Right agenda. The resulting Lough Report advocated for a more managerial approach. It argued the management roles within the new system needed clarification and that the board of trustees should be the employer of the principal. The principal should then be assigned the role of the CEO and manager, and employ all other staff. The Lough Report stated:

The key role of boards of trustees is to develop policy guidelines and to ensure that satisfactory educational outputs are achieved. In pursuing this goal the fundamental decision for boards of trustees to make is the recruitment of their principal; and to then conduct an annual appraisal of this person's performance on a basis that is consistent with the agreed job definition/contract. Management of the school then becomes the principal's role, not that of the board of trustees (Lough 1990, p. 22).

It also recommended setting up an implementation taskforce to assist principals in this objective. In June 1990, the Principals' Taskforce was established to prepare administrative models for schools in key areas, including personnel management (MOE 1990). The Lough Report also foreshadowed two other managerialist initiatives, which were not adopted until a few years later. These were the recommendations that systems be established to bulk-fund all schools, including teachers' salaries, and formally appraise all staff by establishing standards and performance indicators to ensure schools were performing properly (Butterworth and Butterworth 1998).
The Education Amendment Act 1991

By the end of 1990 the Labour Government had been defeated and the National Government was in power with an even more obvious New Right agenda. This became evident by the increased use of market language and the introduction of market initiatives. Lockwood Smith, the Minister of Education, keen to move more quickly along New Right lines, proposed direct resourcing or 'bulk-funding', so that boards of trustees could determine their own incentive/disincentive systems in terms of employment, salaries and performance pay (O'Neill 2001). In the 1991 Education Amendment Act, he also introduced and legislated the 'choice' agenda by abolishing school neighbourhood enrolment zones and giving parents the right to choose which school their child would attend. In Part 11A of the 1989 Act, boards could put enrolment schemes in place to avoid overcrowding, with the consent of the Secretary of Education, where supervised ballots were to be used to decide on student entry (Fiske & Ladd 2000). This was over-thrown by a series of consequential repeals (Part 11, Sections 5, 6, & 7) in the 1991 Act, which abolished school zones, and which allowed overcrowded schools to operate enrolment schemes of their own design to choose students:

5(b) The former section 11(1) of the principal Act,-
that was in force immediately before the commencement of this Act shall continue in force as if it is an enrolment scheme; and may be abandoned, amended, or superseded, accordingly (Government 1991 pp. 478-479).

This immediately created a competitive marketplace into which all schools were thrown, with the consequence of winner and loser schools (Gordon 1994; Hawk and Hill 1996; Thrupp 1998). A market discourse and agenda was now operating in the educational environment. This sometimes competed with, sometimes contradicted and sometimes merged with managerialist discourse and practices.
There was widespread resistance to the bulk-funding policy from teachers, unions and many boards, because of the risk of making salaries vulnerable to budget cuts. The public was wary because of the cuts that had been made in the tertiary sector which had been bulk-funded since 1990 (Butterworth and Butterworth 1996). As a result, bulk-funding was made optional rather than mandatory in August 1991. In 1993 salaries of principals and deputy principals, as well as relieving staff, were transferred into the operations grants for boards to manage (that is, became bulk-funded). Only the salaries of permanent teachers remained centralised (MOE 1994, p. 30). However, the uptake of the bulk-funding option for teacher salaries was slow. Even by 1996, only 10 percent of schools had opted for bulk-funding (MOE 1997a). This was in spite of the financial gain from the bulk-funding formulae, which many schools would have benefited from, and which was the sweetener the government used to try to sell the scheme.

**The Logic of the Discourses Produced Through the Reforms**

Managerialist and market discourses were produced through these New Right reform policies and legislation at the level of the state and education generally, impacting on the employment of educational personnel, particularly principals. As discussed, Boston, Martin, Pallot and Walsh (1996) traced how politicians in conjunction with Treasury and the Business Roundtable worked to create an education market 'regulated' by both competition and legal managerial forms of accountability. The shift away from bureaucracy to an educational market where the provision of schooling was controlled by both competition and democratic forces, has produced contradictory discourses. In the New Public Management discourse in education, schools operated as businesses and were controlled by management strategies with principals repositioned as chief executives who were required to rationalise staffing, finances, plant and curriculum offerings to make the school more efficient, effective and competitive within an education market environment (Court 2001). In the democratic/populist discourse, schools were governed by communities
where some parents were repositioned as governors when elected as board members, who had power over the choice of principals and how the school was run, and others were repositioned as consumers who could make choices about schools for their children.

These two contradictory positions paralleled the debate over centralisation versus decentralisation, where exponents of centralisation argued along economic lines for efficiency in terms of minimising the duplication of services, and effectiveness in terms of ensuring uniform and consistent national standards, and minimising regional, ethnic and social differences. Advocates of decentralisation on the other hand, argued along democratic lines for local autonomy, greater diversity of choice and undue concentrations of power (Boston et al. 1996, p.11).

The impact of the New Zealand model of New Public Management on education can be traced back directly to the theories and practices involved in the model. The assumptions about self-interested behaviour needing to be constrained by the market, underlying public choice theory, led to the policies which shifted the responsibility of schooling from the bureaucratic control of the Department of Education and placed it in the hands of the community under boards of trustees. Bacchi (1999) would claim that the ‘problem’ of education can be determined from the solution implied in the policy. While the solution was to minimise the role of the state, put schools in local control and give parents ‘market’ choices about the kinds of education they wanted for their children, the problem was seen as provider capture by educational sectional interest groups which were represented to be politically abusing their powers.

Agency theory provided the means to achieve the ends of this major shift to decentralisation. Policies and legislation such as the Picot Report (1988) and the Education Act 1989, led to contractual relationships between local schools and the central authority (the Ministry of Education) in the form of school charters. They also changed the employment
situation for principals, to a contractual relationship with the employer body — now the board of trustees, and no longer the government.

Again to employ Bacchi’s analysis to what the problem is represented to be, which has initiated these sweeping changes, one need look no further than the solutions provided in the policies to determine the problem. In this case the contractual relationships established were expected to result in economic efficiencies, according to agency theorists. Specialisation resulting from the division of labour was one expectation, while the other, based on the busnocratic (Peters and Marshall 1996) view of education, was to ensure managers (school principals) acted in the interests of their boards and parents — the shareholders. Where this becomes complicated and pertinent to this thesis is in pre-contract situations such as appointing a new school principal, where the employer (the board of trustees) is at an information disadvantage and may make an adverse selection. The ‘problem’ in this scenario is therefore assumed to lie at the feet of educational personnel, particularly principals, who according to agency theory are not to be trusted, are self-interested and bound to conflict with their employing body, the board of trustees. Economic efficiencies and efficiencies of schooling could only be guaranteed according to agency theorists, by legally binding school principals to contracts negotiated along with their salaries, which provided both the incentives and disincentives to provide the services promised and to act in the interests of the parents (the shareholders).

In the reforms which ushered in contractual arrangements, there was evidence of practices derived from the theory of transaction-cost economics, which was closely related to agency theory. The provision of cost-effective ways of planning, adapting and monitoring task completion was the aim of TCE theory. As stated earlier, the amount of risk in transactions of contracts varied, but particularly in the case of pre-contract situations such as the appointment of a school principal, where there is a high degree of information advantage on the part of the applicant, there is a large risk factor involved in the employer making an adverse selection.
According to the theory of TCE, the complexity involved and uncertainty of predicting a reliable outcome (appointment) makes it very costly to enter into a monitoring situation because of the high transaction costs imposed on governance structures. In such high risk cases, 'in-house provision' (or direct employment) is the most cost-effective course to adopt, because it allows the parties involved to work things out in 'a relatively informal, flexible and ad hoc manner... (and) it reduces the need to specify and negotiate in advance all the possible, often complex, contingencies that might arise during a contract period' (Boston et al. 1996, p. 24).

Consistent with Bacchi's approach, an analysis of educational restructuring policy revealed strategies that ensured 'provider capture' did not occur. Determined to break the employment powers of the former Education Boards which prior to 1989 employed all teachers and principals in primary schools, the government passed on to boards of trustees this employer responsibility. The government, however, was suddenly placed in a difficult position of how to effectively monitor this responsibility. They faced the problem of needing to create monitoring systems that were cost effective, but which gave them all the complex information they needed, and in line with TCE theory, it soon became clear that such monitoring systems would have been too costly. To have a Ministry official sit on every principal appointment to monitor the board’s appointment procedures would have been an expensive exercise. The problem then became 'how much risk is there if we don’t monitor at all?’ versus ‘what is the cost if we do?’ The solution of not monitoring the appointment process at all and instigating in-house provision, which was the most cost-effective situation and the solution chosen, therefore clearly illustrates the view that the risk was not seen worth the high transaction costs. A purely economic decision outweighed any other rationale or representation of this problem of ensuring the right person was appointed to the job.

The logic of new managerialism or NPM that infiltrated the educational reforms was noticeable in the way schools were expected to operate as
businesses from a management perspective. Principals were now assumed to be managers rather than professional leaders, and to learn new management skills based on economic, technical and rational forms of management (Codd 1990a), such as organising a school on the basis of mission statements and strategic plans, and appraising staff against professional standards and competency criteria. Accountability for results of staff performance and student learning was also devolved to principals and they were expected to become financial managers, working within limited budgets. Not only has there been a huge shift in the expected behaviour of the principal, but also in the way they are positioned and treated. They are employed as Chief Executive Officers on individual contracts, with performance agreements and performance-linked remuneration systems, all of which imitate private sector management practices.

Bacchi's analytical approach would consider not only how principals have been re-positioned with these reforms, but also what was the problem that produced this solution? The reforms focused on principals improving the efficiency and effectiveness of their school, implying past inefficiencies. The reforms made principals answerable or accountable to stakeholders – parents and boards of trustees. By implication, they were previously only seen to be accountable to their own profession or the bureaucracy, i.e. provider capture.

Prior to these reforms, the principal's major role was as the professional leader of the school, based on qualities of educational expertise and the authority to make autonomous and professional decisions. The New Public Management standpoint viewed principals as having too much autonomy and being too closely aligned with their sector group interests. The solution to this problem was to break the stranglehold of the educational bureaucracy and to radically change the employment relations of the principalship.
The Language of these Discourses

The reforms not only meant a change of style in governance or changes in the techniques of public management, they have also produced the use of a new language of discourse. The market discourse arising from economic language is reflected in terms such as contracting, performance agreements, appraisal, outputs and outcomes, so that student learning has become described as learning outcomes, parents are described as clients, teachers have become providers and principals are now chief executive officers. Managerialist discourse is reflected in phrases such as strategic planning and management, performance management, human resource management, and financial management.

New Zealand Reforms Set in International Context

The transformation of public management in New Zealand did not occur in isolation, but was part of what Boston et al. (1996, p. 6) called ‘a comprehensive strategy of economic, social, and political reform, the chief aim of which was to improve the country’s economic performance and thus end almost three decades of relative decline’. Neither did the transformation occur in isolation globally. Similar competitive market economies were introduced in Britain under Thatcher and in the United States under Reagan as market liberalism was promoted (Codd 1993a; Whitty 1997). What was different from other countries was the speed with which the New Zealand model occurred, the coherence of it, and the vast extent of the state restructuring involved (Boston et al. 1996). It has been argued by Roper (1991, p. 47) that in New Zealand, neoclassical economics ‘has been spectacularly successful in giving ideological coherence’ to the reformers’ agendas for state economic management.

Focusing on the education reforms introduced into New Zealand in 1989, it has been argued that they were ‘the most thorough and dramatic transformation of a state system of compulsory education ever undertaken
by an industrialised country' (Fiske and Ladd 2000, p. 3). Not only did the reforms turn one of the world's most centralised and tightly controlled public education systems into one of the most decentralised, but it did it virtually overnight, with the Education Act 1989. Legal responsibility for the governance and management of nearly 2700 state schools switched abruptly from the national Department of Education, a large and cumbersome bureaucratic body of professional officials, to individual boards of trustees comprised of lay volunteers elected from each school community.

The restructuring of education, heralding discourses and ideas of market competition and fiscal restraint which have been imposed in New Zealand since 1989, has also occurred in other Anglophone societies including Britain, Australia and the United States (Ball 1995; Halsey, Lauder & Brown 1997; Taylor, Fazel, Lingard & Henry 1997; Whitty, Power & Halpin 1998; Fiske and Ladd 2000; Levin 2001). Levin (2001) compares the degrees of reform over four countries - New Zealand, Britain, and certain states in Canada and the United States - and argues that Britain and New Zealand adopted the most radical changes. The reasons for this, he claims, are political and geographical. Both countries are small and are largely unitary states, and both have centralised governments and political cultures where parties try to claim the political centre. All these factors, he believes, have made it more possible for policy makers in these two countries to create and implement the market reforms they desired in education, than has been the case in the federated systems of North America or Australia, with the exception of the state of Victoria, Australia (Caldwell and Hayward 1998).

Nationally Australia did undertake structural adjustment policies similar to New Zealand with reduced investment in education, health and welfare and decentralised industrial relations, but the capacity to implement educational policies was limited by state governance of education. In New South Wales and Victoria, Taylor et al. (1997, p. 88) link the market conception of devolution with the Liberal Government's 'new right
opposition to the bureaucratisation of education and the desire to enhance parental choice in education'. Market effects, they claim, occurred in Victoria where the "Schools of the Future" programme has 'sought to mimic corporate sector practices' (1997, p. 91).

These reforms were part of an international trend towards the adoption of managerialist, corporatist and New Right ideologies in post-industrial societies in the late 70s and early 80s (Halsey et al. 1997). They were seen to be necessary to counter western economic recession in the face of dynamic growth in global markets, especially in the industrialising Pacific Rim (Chitty 1989). They were also needed to update outdated Fordist principles of mass production which required bureaucratic hierarchical organisations to sustain them (Brown and Lauder 1992). In Britain they have been seen as a result of the perceived 'crisis of the welfare state' and the need to restructure it along with the public sector (Clarke and Newman 1997).

In the decade immediately before 1985, New Zealand had experienced an era of welfarist paternalism dominated by one man, National Prime Minister, Robert Muldoon. In implementing policies which included wage price freezes and subsidies for key supporters, overspending on 'Think Big' projects and selling off state-owned enterprises, Muldoon ignored the advice of key governmental central agencies, the Treasury and the States Services Commission (James 1986). By June 1984 he had over-reached himself with his authoritarian political, social and economic policies and when he called a snap election (Kelsey 1995), the National Government was defeated in a landslide, leaving the new Labour Government to pick up the pieces and deal with the largest overseas debt this country has known. Educational restructuring was begun in New Zealand by a Labour Government (1988-89) and concluded by a National Government (1990-1999), as it was in Australia, when Labour initiated moves to link education more closely to the nation state after the 1987 economic recession (Taylor et al. 1997).
To summarise, the Labour Government that introduced the initial education reforms had, as a result of the economic situation it inherited, embraced monetarism and the 'New Public Management' philosophy (Whitty et al. 1998). Finance Minister Roger Douglas deregulated many economic sectors, privatised many state agencies and services, reduced public spending in a large number of areas and moved towards downsizing the state sector (Levin 2001). A decade later, by the end of the reforms, the National Government had imposed a much more devolved system in terms of free parental choice than occurred even in England or Wales, by giving boards of trustees control over their enrolment schemes and by abolishing zoning (Lauder, 1997 in Halsey et al. 1997; Whitty et al. 1998).

The Changing Role of Central Education Agencies

During restructuring the role of key central agencies in education changed significantly. The former Department of Education “downsized” considerably in both numbers of employees and function, and was transformed into the Ministry of Education, which was designed originally just to make policy. The Education Review Office replaced the former Inspectorate and was concerned with the audit and assessment of education and advising the Minister. The teacher unions, which had always had a prominent professional contribution to make to education, in addition to industrial relations, were targeted by the National government through the Employment Contracts Act, and attempts were made in legislation to decrease their functions and influence.

The Ministry of Education

The 1989 Education Act created the Ministry of Education as a central policy-making body with a hands-off approach to schooling, unlike the Department of Education it replaced. Although its operational powers were sharply curtailed by the Act, it still sat at the centre of the system and retained significant powers. By devolving operating authority to boards of trustees for the actual delivery of educational services, it operated a
contractual model of governance (Fiske and Ladd 2000, p. 61), establishing the parameters by which self-governing schools operate. It sustained a state system of compulsory education; it set overall policies with the minister; it established national curriculum guidelines; it administered educational funds, managed property, and along with ERO, held schools accountable for their performance.

The policy-only role of the Ministry has shifted as the reforms have progressed, and a much more interventionist approach has eventuated over the last fifteen years. During the National Government’s 1990–1999 reign, the market discourse prominent in many of the policies kept the Ministry from intervening in the self-management function of boards, and the business ethic of poorly functioning schools failing in the market was tolerated. This reliance on the market remained until the Labour Government got back into power in 1999, when a number of pull-back policies demonstrated that it was no longer appropriate to allow the market to close schools. The appointment of the Labour coalition Minister of Education, Trevor Mallard, in 1999, who had had a career in education, meant a change in direction from some of the managerialist and market New Right measures. The passing of the Education Amendment Act in 2000 abolished bulk funding, which had been strongly opposed by the teacher unions (Simkin 1995), and re-established school enrolment zones with a ballot in the case of overcrowding, so that parental choice could no longer predominate over the rights of students to attend their neighbourhood schools.

In other managerial ways the Ministry in the National government’s reign intervened in the operational role of boards of trustees. After a series of ERO reviews which raised concerns about the performance of some schools (ERO 1995; ERO 1996; ERO 1998), the Ministry of Education introduced accountability measures to improve teaching standards and management practices. One such measure resulting from ERO’s prompting was the introduction in February 1997 of national appraisal requirements for all principals and teachers, (MOE 1997b), which paved
the way for performance-management systems and professional standards.

The latter were negotiated by the Ministry of Education in the teachers’ employment contract settlement in 1998. At this time the Ministry’s role had changed from purely policy-maker to include the former State Services Commission functions of negotiator of the Teachers’ Collective Contract. It also negotiated salary contracts with teachers and administrators, after the State Services Commission devolved it the authority to do this. This was a significant shift towards a much more hands-on, interventionist position. After a long period of depressed economy and subsequent low pay scales for teachers, the Ministry of Education scored a coup in 1998 by trading off substantial pay increases for primary teachers, through pay parity with secondary teachers, in exchange for the adoption of professional standards, performance-management systems and more rigorous accountability measures including performance pay (NZEI 1998; O’Neill 1998). This was a clear example of market and managerialist discourses complementing each other and working together to produce outcomes that fitted the government’s agenda.

The Education Review Office (ERO)

One of the central goals of the Picot (1988) taskforce was to develop a system with clear lines of accountability and effective mechanisms for enforcing them. The Education Review Office (ERO) was thus established to monitor externally the performance of individual schools and to report to the Minister of Education. The model of accountability designed for schools was essentially a management-oriented model, evaluating schools at arm’s length, rather than the professional model of the former inspectorate, which had helped teachers with teaching and learning. The chief review officer, Judith Aitken, who had previous experience in public administration and strategic planning, determined that the review process should be public and reports on schools would be available to the media, so that the pressure of public opinion would motivate change. She
developed teams of review officers who acted in quasi-judicial ways to monitor how teachers, boards and schools were performing. She instigated assurance audits in 1992 to determine how well boards of trustees were meeting their legal obligations to the Crown as specified in each school charter. In 1992-93, only 12 percent of boards were fully legally compliant. By 1998, 90 percent of boards were compliant (Fiske and Ladd 2000).

Alongside this, in 1993, ERO added effectiveness audits in which the agenda was to improve the quality of student achievement and educational outputs. Until 1995, ERO targeted boards of trustees to ensure improvement, as they were accountable for governing schools. This targeting was prompted by an ever-increasing gap that had become apparent between schools that were successful and schools that were not, caused largely by National’s dezonning and choice policies (Gordon 1994; Lauder, Hughes, Waslander, Thrupp, McGlenn, Newton & Dupuis 1994; Strachan 1994; Fiske and Ladd 2000). After 1995, ERO shifted its emphasis from targeting and holding responsible poorly skilled and underachieving boards of trustees for this decline in standards, to holding teachers and principals responsible. This can be most clearly seen in the shift of emphasis from compliance reviews to effectiveness reviews. In 1998 ERO consolidated both these reviews into accountability reviews, which pay less attention to compliance issues and more to academic outcomes and self-review processes (Fiske and Ladd 2000).

Teacher Unions
Prior to the 1989 reforms the teacher unions were consulted as ‘partners’ in education (Jesson 1999) on most matters to do with curriculum, teaching and learning, as well as teachers’ conditions of service. This partnership was eroded with the structural changes in employment relations in the reforms driven by the market agenda of Treasury and the managerialism of the State Services Commission. However it was not until labour market flexibility was initiated by the 1989 Labour Relations Act and legislated for by the Employment Contracts Act 1991, that the influence of
unions was severely curtailed, through the removal of the role of unions in wage bargaining. The removal of the union monopoly from wage bargaining was seen as necessary by Treasury, the Business Roundtable and the right wing of the Labour Government, in order to create a free labour market. Unsurprisingly, within such an environment that favoured non-union individual contracts, unions with a history of compulsory unionism struggled to maintain a voluntary membership. The teachers' unions, however, which had always been professional and voluntary survived and are now the largest group of unionised workers in the country (Jesson 1999).

In spite of the erosion of union influence in the present climate of contractual employment relations, manageralist appraisal systems, professional standards and performance pay, the teacher unions have thwarted the government's final phase of implementing managerialism by successfully resisting the introduction of bulk funding. In this they also had the support of boards of trustees, and according to Jesson have saved schools from being transformed into 'individual competing enterprises' (1999, p. 140).

**Equity Policy Shifts During the Reform Period**

In the midst of the ascendancy of managerial and market discourses during the restructuring reform period, there was also the appearance in legislation of equity discourses in the Human Rights Act 1993 and Equal Employment Opportunity (EEO) provisions in the State Sector Act 1988. These discourses were more marginalised than the dominant managerialist discourses associated with restructuring, and as time went on EEO also became undermined with decentralisation (O'Neill 1992; Court 1994c). Equity policies and gender reform have been eroded in Britain and Australia also, under new regimes of accountability which allowed the state to shirk responsibility as these have become

State Sector Act 1988

The equity discourse in the State Sector Act 1988 was produced from two parts of the Act – the good employer principles (Section 77a) and the equal employment opportunities provisions (Section 77d) (see Appendix One for the full transcript). Each policy section produced different official discourses or rhetoric (Jones 1994). An analysis of these identifies the shifting meanings and power relations within EEO. Most analysts agree that EEO policy has both liberal and radical aspects as it presently stands in New Zealand legislation (Armstrong 1994; Briar 1994; Sayers and Tremaine 1994; Walsh and Dickson 1994).

Section 77d of the Act promotes a liberal discourse by requiring each employer to develop and comply with an EEO programme that:

- is aimed at the identification and elimination of all aspects of policies, procedures, and other institutional barriers that cause or perpetuate, or tend to cause or perpetuate, inequality in respect to the employment of any persons or groups of persons (Government 1988, Section 77).

The assumption here is that the purpose of an EEO programme is to ensure that impediments to a freely operating labour market are eliminated, and that under the merit principle (Section 60 of the Act), individuals compete freely and are chosen according to so-called objective attributes depicting ‘the best person for the job’. Burton (1988) argues, however, that the ‘merit principle’ is value laden, far from objective and that male or managerial perceptions of merit are highly problematic for women and other target groups.
The radical discourse, which sits uneasily beside the liberal model, is in the depiction of target groups rather than individuals, and the favouring of labour market outcomes rather than procedures (Jewson and Mason 1986). The good employer principles (Section 77a of the Act) recognise four target groups: 'the aims and aspirations of Maori people, and ethnic or minority groups; and the employment requirements of women, and persons with disabilities'. The statutory obligation of employers to take account of the employment requirements of affirmative-action target groups signals a clear departure from the liberal intent of just looking after the labour market needs of the organisation (Walsh and Dickson 1994).

Some analysts see the liberal/radical dichotomy as too limiting in explaining the complexities of EEO policy. Cockburn (1989) calls for a transformational model of EEO, while Sayers (1994) builds on this and advocates for a pluralistic model. Walsh and Dickson (1994), however, believe that in New Zealand the tension between the liberal and radical versions of EEO in the Act was largely resolved in favour of liberalism, with the transformational model subordinated to both of them. Jones (1994, p. 178) appears to agree when she says,

In a bureaucratic discourse the idea of appointing 'the best person for the job' would be seen as more 'efficient', and while the talk was once of 'social justice' it has now shifted to 'efficient business practices' and 'market forces' as the policy environment has changed.

Sayers (1994) discusses how the state sector became more market-oriented with the introduction of the Public Finance Act 1989, the repealing of the Employment Equity Act 1990 and the introduction of the Employment Contracts Act in 1991. Thus it seems that the more radical notion of equity has shifted with the ongoing managerialist reforms and has become a more watered-down discourse along liberal, individualistic lines.
One way that this has happened has been in a shift of language. As a way of making the radical element (i.e. the target groups) of EEO more palatable in a managerial climate, the discourse of human resource management (HRM) has rearticulated the notion of affirmative action for target groups, and shifted the language of EEO from 'eliminating discrimination' to 'managing diversity'. The watering-down occurs, as Jones (1994, p. 182) points out, because 'the idea of “managing diversity” addresses “difference” in terms of managers’ needs and not the “disadvantaged” or “oppressed” groups traditionally marginalised by “difference”'.

**Education and EEO**

The State Sector Act was amended in 1989 to include the changes brought about by the new restructuring legislation, and, along with the changes in the Education Act 1989, boards of trustees were made the legal employer of staff at their school and responsible for ensuring that EEO responsibilities and requirements were met. This was the beginning of the undermining of EEO in education, with decentralisation and devolving of responsibility to the local level.

The State Sector Amendment Act 1989 required boards to meet the provisions of Sections 77A and D which, in addition to the original 1988 Act, further required boards to report annually to the Education Review Office, providing:

- A summary of their EEO programme for that year; and
- An account of the extent to which the employer was able to meet the objectives contained in the programme (Maxwell 1996, p. 4).

The additional compliance and reporting requirement from the 1989 Amendment Act was met with a great deal of resistance by boards, and by 1994 fewer than one third of schools were reporting to ERO. Of these only 1.7 percent (18 schools) were deemed to have outstanding EEO reports.
Twenty-five percent of reports were rated 'good'; 28 percent as 'satisfactory' and 45 percent as 'unsatisfactory' (ERO 1994). It seemed clear from the outset that EEO policy intentions were not being met with a great deal of success in the education sector. Neither were they having any impact on increasing the gender diversity of the principalship. The teachers' union, the New Zealand Educational Institute (NZEI 2000, p. 8) reported:

There is clearly a relationship between the EEO policies and practices in schools and the appointment of women to senior positions. Arguably, the inadequacy of EEO policies and practice at the school level has a causal effect on the appointment of women to senior and principal positions in primary schools.

The Education Act 1989, Section 60A, gave the Minister of Education authority to determine National Education Guidelines. In 1993, the Minister updated these to state that each board of trustees was to be a good employer as defined in the State Sector Act 1988 and that the provision of an EEO programme become a mandatory charter requirement for all state and integrated schools (Maxwell 1996). This was one attempt at integrating the existing EEO legislation into the working ethos of schools.

However, the Minister, Lockwood Smith, at the same time single-handedly and without consultation removed the equal educational opportunity goals from charters in those same guidelines, which was another example of watering-down the equity agenda. Smith's views on the matter were first publicised in his Policy on Education speech (Smith 1990, p. 1), "Investing in Achievement", when he made the claim that 'Labour's social engineering at the expense of our children's future must be stopped'. Among other things he was referring to equity provisions introduced by Labour in the previous government. Although equal educational opportunities were not included in the State Sector legislation, they were part of the original 1989 National Education Guidelines (Ballard 1989), and
most educationalists and board members could appreciate the equity principles inherent in them:

**Equal Educational Opportunity**

The aim will be to ensure equal opportunity for all students to participate and succeed in the full range of school activities.

The board of trustees will adopt policies and practices that identify and cater for the individual needs of each student in the school. These will affect the school’s curriculum and the way the school distributes resources.

They will include programmes that redress existing inequities and address the current and future needs of students, particularly:

- Maori
- Pacific Island
- Other ethnic groups
- Women and girls
- Students with disabilities
- Students with other special learning needs (Ballard 1989, pp. 5-6).

In April 1993 the National Education Guidelines were revised and Equal Educational Opportunities objectives were dropped from the requirements in school charters.

As a result of these two contradictory actions legislated for within the Guidelines, many boards were confused and disillusioned. As Court (1994c, p. 211) says: 'EEO has been difficult to advance in an environment which ignores or sidelines equity issues as being tainted with the evils of “social engineering” and where equity in education is expected to arise out of natural market forces'. The role of boards as employers in practice is addressed in more detail in the next section in this chapter.
The managerialist discourse of compliance of EEO plagued and preoccupied the education sector over the decade from 1989, so that while some boards genuinely and proactively sought to meet the EEO requirements (Brooking 2002), the majority were noncommittal, as the 1998 ERO annual report to Parliament shows. Sixty percent of all schools (2657) complied and reported to ERO, but of these only three percent were assessed as good, 33 percent as satisfactory and 64 percent as reporting minimal EEO practice (ERO 1998c p. 98). As the report states:

ERO assessed the standard of EEO practice to be minimal in nearly two thirds of the 1998 reports analysed. This is of considerable concern, as it indicates that schools have made little progress in implementation of EEO in the ten years since the State Sector Act came into force (1998c, p. 87).

By 2001, the compliance aspect of EEO was being reassessed by policy makers, and with the introduction of the Education Standards Act (2001), reporting on the EEO annual programme was integrated into the whole-school reporting structures outlined in that legislation, and was no longer required as a separate report to ERO. It is too soon to evaluate the effects of this reporting change strategy, but some commentators have predicted it spells the end of EEO in the education sector (Maxwell 2000). Even in 1998 ERO was calling for more powers to enforce the statutory requirements: ‘this year’s findings again suggest that more effective incentives, sanctions and practices in this area are required’ (1998c, p. 88).

The most recent watering-down shift in the equity discourse in the education sector mirrors the shift described above in the public sector, where the official discourse of EEO is now ‘diversity management’, which has taken over from ‘eliminating discrimination from target groups’. The latest official publication to schools from the Ministry of Education is titled
'EEO in Schools: Building on Diversity'. The following quotes from the publication illustrate this shift:

**What is EEO?**
EEO is about creating a workplace that attracts, retains, and values diverse staff...
Implementing EEO requires thinking about the impact of all management policies and practices on diverse staff.

**Does it need to be called EEO?**
No. EEO is the common term...Other terms you could use include:
• valuing diversity
• managing diversity...
• employer of first choice
• valuing our people

**What do we mean by diverse staff?**
Your school needs to find ways to meet the needs and maximise the potential contribution of all staff (MOE 2003 pp. 1, 2 & 4, my emphasis).

It is salutary to point out that for the first time since the introduction of EEO provisions in legislation in education, the manager who produced the 2003 publication was drawn from the public sector with a Human Resource Management background, with no previous experience in education. Previous managers of the EEO unit in the Ministry of Education had always been involved in education, and preferred less managerial discourses.

**Boards of Trustees**

In this section I discuss the post-1989 position of New Zealand boards of trustees (hereafter referred to as the board), how they are constituted and their roles and responsibilities, particularly in relation to their employment
role. I compare this briefly with the international literature which focuses on systems which are closest to the New Zealand model, that of Britain and the Australian state of Victoria. I pay attention to the main legislation that impacts on boards’ responsibilities in terms of employment, specifically the EEO provisions of the State Sector Act 1988, the Human Rights Act 1993 and the Employment Relations Act (2000).

Before 1989, New Zealand secondary schools operated under a system of governing bodies, similar to the concept of boards of trustees in as far as employment of the principal went. Primary schools, however, were centrally administered by the Department of Education and the ten regional Education Boards, who controlled all employment matters. Principals and teachers in primary schools applied for positions at a particular school but were selected on a system which took into account the ‘grading’ of each applicant, determined by inspectors from the Education Boards. Thus seniority and experience determined who won the teaching or principal position.

How Boards are Constituted

Boards of trustees were constituted through the Education Act 1989, as recommended by the ‘Tomorrow’s Schools’ policy document (Lange 1988). This Act swept aside all previous centralised administration systems for both secondary and primary schools and invested a range of professional, personnel and financial powers in a governing body (board of trustees) for each school. Membership of boards occurs by quasi-democratic processes. The principal of the school is a member by right, a staff representative is elected by the staff of the school, five parent representatives are elected by the parents of children attending the school and up to four additional members can be co-opted to the board to ensure fair representation of the community, including gender and ethnicity, and to ensure the range of skills required is covered. In secondary schools an additional member is the student representative who is elected by the
student body. Initially, co-opted members had to be parents of children at the school, but this is no longer the case, so many boards seek to co-opt specialists such as lawyers and accountants from within the community. The composition of boards was designed to ensure that the balance of power would be held by parents in decision-making matters.

Board Training

Boards of Trustees elections are held every three years. While some boards have a complete turnover of members, most have a few parents who remain for a further term. However, constant training of new board members is imperative for smooth running of schools (Gilmore, MacGibbon & Besley 1998) and ‘capacity building’ (Robinson, Ward & Timperley 2003, p. 278). The Ministry of Education contracts training responsibility to various groups in the public and private sector, allocating some funding for these purposes. Funding falls short of need in many areas, as in the case of the training available for employment matters. While training was originally available for EEO support, it was targeted to schools who were non-compliant in the reporting requirements, before the change in the Act in 2003. There never was funding available for selection and recruitment training specifically. ERO has identified 45 percent of boards as untrained in this area and Wylie’s studies reiterate this as a problem (Wylie 1997a; Wylie 1999).

Inadequate training becomes an even larger problem when it is linked to the lack of professional expertise of many board members, especially in rural areas. Wylie (1997b) found rural trustees were less likely to hold tertiary qualifications and only 15 percent had professional occupations compared to 50 percent of urban trustees. Rural boards typically experience difficulty attracting full board membership, they have high turnover of members, they suffer from virtually no institutional memory, they rely heavily on the principal to carry out governance responsibilities, and many are suffering a spiral of decline (ERO 1999b). At one EEO
board-training session I held in the far North in 1999, I found the majority of the board were unable to read.

**Board Responsibilities**

The original legal contract which bound boards to their self-managing school responsibilities was the school charter, which trustees wrote after consultation with their local community, setting out their school’s objectives within a framework of national objectives known as the National Education Guidelines.

The self-managing school concept has been described by Caldwell and Spinks (1989, p. 12): ‘Within a loosely defined national framework, individual schools should be able to develop curriculum details and allocate resources as they see fit to meet the particular mix of local needs’. The charter was the contract between the community and the school, and the school and the Ministry of Education (Picot 1988). This was the means by which the concept of partnership was to be put into practice. The board was intended to act as the link between the community and the school and also as an agent of the state.

In 1989 each board developed a charter specific to their school by including a local community profile and local goals as a result of community consultation. Charters also included nationally prescribed elements known as the National Education Guidelines. After 1993 there were three parts to these: the National Administrative Guidelines (NAGs), the National Educational Goals (NEGs) and the recently revised gazetted curriculum documents. The NAGs outlined the non-negotiable responsibilities of boards, for which they were accountable to the State and audited against every three years by the Education Review Office.

These non-negotiable responsibilities include:

- Student achievement through teaching and learning programmes (NAG 1);
• Policy development and self review (NAG 2);
• Staff employment and personnel matters (NAG 3);
• Property and financial management (NAG 4);
• Health and safety for staff and students (NAG 5); and
• Administrative systems (NAG 6) (MOE 1993).

Devolution of these kinds of responsibilities to communities of lay people, who are virtual volunteers\textsuperscript{12} and not necessarily skilled in the area, but who are held accountable to central government, has never before been seen on this scale in education in this country, or indeed in any other country. Where devolution to the site level has occurred elsewhere, as in England and Victoria in Australia, the power has generally shifted to the school through the principal, who is considered the lynch-pin, rather than to the community (Deem, Brehony & Heath 1995; Townsend 1997; Sachs and Blackmore 1998; West, Jackson, Harris & Hopkins 2000).

The Role of the Board as an Employer

This thesis will focus on just one of these board of trustees responsibilities - that of NAG 3 (ii) - and explore the implications of the board's role and responsibilities as an employer. NAG 3 reads:

According to the legislation on employment and personnel matters, each Board of Trustees is required in particular to:

(i) develop and implement personnel and industrial policies, within policy and procedural frameworks set by the Government from time to time, which promote high levels of staff performance, use educational resources effectively and recognise the needs of students;
(ii) be a good employer as defined in the State Sector Act 1988 and comply with the conditions contained in employment contracts applying to teaching and non-teaching staff (MOE 1993).

Under these guidelines boards are required to act as the employer to all their staff. Included in this role is the requirement to select and appoint a principal, who is then delegated the role of making recommendations to the board about the appointment of all other staff. This places a great deal of power with the board, who have total autonomy in making their decisions and who are not answerable or held accountable to any outside authority to defend these decisions. The only monitoring body set up by central government, the Education Review Office, has no authority to comment on employment decisions except as prescribed under the very limited EEO provisions of the State Sector Amendment Act 1989. Not only are boards left to their own devices and decisions around employment, but they are also not given any guidance on the matter by central government. Boards may wish to use external advice in the process of appointing a principal and many do invite advisors or other senior principals to help them. However they are not required to do this. In a recent survey, ERO found nearly a third of boards did not seek help or guidance from a professional in the appointment process (ERO 2001). There is also no systematic training available to boards on selection and recruitment, and it has been reported that many boards are appointing on 'gut reactions' (Notman 1997; Hague 1998), with no training or expertise in this area (Wylie 1999).

This deregulation has not occurred in Britain and Australia to the same degree. In both countries officials from Local Education Authorities (LEAs) in Britain or state governments in Australia have retained some control in terms of monitoring, moderating and advising local governors in personnel matters, including the selection of a principal (Deem et al. 1995; Riley and Rowles 1997; Gronn and Rawlings-Sanaei 2003). In Britain, Wilson (1997, p. 14) reports;
The Chief Education Officer of an LEA has a legal duty to advise on appointments and LEAs may offer guidance and training in equal opportunity matters, but formal equal opportunities policies will clearly have less an effect than in the past.

This monitoring appears to have benefited the representation of women in the principalship in Britain, where women occupy 61 percent of primary principal positions and men only 39 percent (Fidler and Atton 2004, p. 109), compared to New Zealand with women at 40 percent and men at 60 percent. Both countries have similar demographics of women in the primary teaching workforce – around the 82 percent mark. In the state of Victoria in Australia, the statistics include both primary and secondary schools, which lessens the likelihood of women dominating the workforce. Sixty eight percent of teachers in Victoria’s government schools (primary and secondary) are female, but only 35 percent of principals are women (Lacey 2004, p. 7). Here, as in New Zealand, selection practices act as disincentives to many women applicants to the principalship (Lacey 2004), which many believe are skewed in favour of the ‘boys’ club’ (d’Arbon 2004).

Applicants for principalships in New Zealand do not currently need any pre-requisite training or credentials. This exacerbates the problem of women’s representation in the principalship. Because New Zealand is behind most other English-speaking countries in legislating for beginning principals to have pre-principalship training (Stewart 2000; Lovegrove 2001), it is possible for any trained teacher to apply and be appointed to a principal’s position. This has led to the situation where inexperienced, underqualified teachers, some of whom are only provisionally registered13, have been appointed as principals (Whittall 2001). Most of these situations occur in small rural communities with inexperienced boards, and some such appointments have had disastrous consequences. Where principal turnover is high, children’s learning suffers and dissatisfaction rises in the
community. Whittall's research findings from the rural sector in the top of the South Island revealed some schools had had as many as eight or nine principals over a ten-year period. Of 50 schools he surveyed, 40 had averaged a new principal every 2.4 years (Whittall 2001, p. 22).

Legal Requirements Around EEO

Boards are required to be good employers under the equal employment opportunities regulations in the State Sector Amendment Act 1989, but this Act does not have the teeth to monitor or hold accountable boards who discriminate in appointments or who treat staff unjustly (Court 1994c; Strachan 1995). In fact, there are no provisions in the Act to proactively and systematically support a redistribution or shift in the diversity representation of the workforce, such as the quota systems introduced in the United States (Sayers and Tremaine 1994). The failure of EEO provisions to bring about radical structural change can be seen in the continuous lack of gender diversity in the principalship in New Zealand. The same has been reported in Britain with secondary headteachers, where EEO legislation that has been in place since the 1970s has resulted in little change (Coleman 2002).

The EEO requirements in New Zealand are prescriptive rather than proactive and merely require each board of trustees to furnish an annual report of an EEO programme that is implemented for the benefit of all staff, but with specific recognition of four target groups. These target groups are Maori, women, Pacific Islands people and other ethnic minority groups, and people with disabilities (see Appendix One). EEO acts as an umbrella for all personnel policies including recruitment and selection, promotion and career development, staff training and professional development, appraisal, performance management, conditions of service, sexual harassment prevention and personal grievance procedures. However, the Act does not require boards to report on details of the above policies and practices in their annual EEO programme, so it fails to act as
a monitoring agent of the quality of equal employment opportunities in a school. All that is required is a progress report on one or two objectives which have been implemented during the year, such as a family friendly initiative, personal professional objectives for target group members, and so on (Brooking 1997).

Effectiveness of EEO in Schools

The Act also fails by focusing on reporting documentary compliance rather than action compliance (i.e. putting EEO into practice), making assumptions that boards will be acting as good employers because they say they are. It also makes assumptions that boards who do not report are acting as poor employers. In the course of six years of supporting boards with EEO I have found both assumptions may be untrue; in fact, the opposite may be occurring. In terms of the reporting of documentary compliance requirements, the results over the twelve year's duration of the Act have been regarded as disappointing by the audit authority. In ERO's annual reports to Parliament over this time, not more than three percent of boards have been assessed as providing evidence of good EEO programmes in their schools. Around 33 percent have been assessed as satisfactory and around 64 percent assessed as reporting minimal EEO practice. Between 30 to 40 percent of boards fail to report at all (ERO 1990-1999). Once every three years, when a school receives a visit by ERO, they may be admonished for not furnishing an EEO report annually, and asked to do so. That is the extent of the monitoring of EEO.

My contract work with non-compliant (i.e. non-reporting) boards has revealed very different results. I have found real resistance from boards and principals to the plethora of reporting requirements spilling out from central government since the reforms began, and because of the way EEO has been legislated in education, many boards regard this as a pointless form-filling exercise. This does not mean, however, that they are not acting as good employers. Many do not understand the principles of
EEO, but when these are explained to them can give examples of good employment practices happening in the school. Research into effective EEO practices in schools (Brooking 2002) resulted in a book of case studies, most of which came from schools deemed by ERO to be non-compliant. On further investigation the schools were often initiating extremely effective and original good employer practices, but were failing to report on them to ERO.

On the other hand, the Act does have the benefit of specifying the four disadvantaged groups or target groups in the workforce (Sayers and Tremaine 1994). The four target groups are required to be consulted and programmes must be designed around their needs, along affirmative action principles. Most of the schools we have worked with in our contract have accepted this principle and created positive programmes for the target groups on their staff. It is often the principal, if he is white and able-bodied, who creates the most objections because he is not included as a target group member. While males are underrepresented in teaching, they are not disadvantaged. In the public sector the devolving of EEO responsibility to the local level enhanced the opportunities for successful resistance to EEO, where its progress depended on the attitude of the chief executive (Boston et al. 1996). This has been as evident in schools as in the rest of the public sector.

Human Rights Act 1993

The legislation which sits alongside the EEO provisions in the State Sector Act, and which does have 'teeth', is the Human Rights Act 1993. This can award damages for unlawful acts involving discrimination of up to $200,000 (Rishworth, Walsh & Hannon 2001). The Act makes it unlawful to discriminate against anyone seeking or in employment on the grounds of a number of criteria, including sex, marital status, colour, race, ethnic or national origins, disability, age, family status and sexual orientation (Government, 1994, see Appendix Four). There have been very few cases in education where employees who have been discriminated against by
employers have used this Act to right the wrongs they have endured. Partly this is due to the legal costs involved and partly to the stress caused by the high media attention these cases attract (Strachan, 1994 in Carroll 1994). The implications of the latter in a small country like New Zealand is that re-employment in another school is often very difficult, as employees who have taken legal redress are often regarded as troublemakers by boards.

**Employment Relations Act 2000**

Recourse through the Human Rights Act is legally possible in cases of employment discrimination, even if not used often. However, it is impossible under present employment legislation for a dissatisfied applicant to appeal a decision against a board unless they are already employed by that board. The Employment Relations Act 2000 does not allow a grievance to be taken against a potential employer. It is only possible to take a grievance out against a present employer. This makes it very difficult for applicants to make discriminating practices by a board visible.

**Industrial Relations**

Employed principals, on the other hand, do have an avenue of redress against poor employment practice by a board, in the form of a personal grievance under their employment contract. Most such grievances are resolved at school level but a small number go to the Employment Tribunal for mediation (NZSTA 1999). Grievances unresolved by mediation are decided by the Employment Relations Authority under the legislation of the Employment Relations Act. In 1993 the School Trustees Association (STA) conducted a survey which found there had been 319 reported cases of conflict between principals and their board since the
beginning of the administrative reforms in 1989. A little later, in one year alone (1998), there were 152 reported industrial/personnel cases involving principals (NZSTA 1999). Few of these reached the Employment Relations Authority for the reasons cited above, but anecdotal evidence suggests that many principals have resigned as a result of irretrievable breakdown in their relationship with the board.

**Board Accountability**

During the decade of the 1990s accountability measures increased considerably as a result of the managerialist impact of the policy adjustments of this decade for both principals and boards. This led to workload increases for both (Wylie 1997a; Livingstone 1999; Wylie 1999; Martin 2001), greater possibility of tension and conflict between both (Collins 1999), and increased stress for both groups. One obvious source of increased accountability causing stress was the regular assurance (legal) and effectiveness (educational) audits carried out by the Education Review Office, requiring schools to furnish evidence of their performance (Robertson 1995). However, the possibility for the greatest stress and tension between board and principal arose out of their employment relations as a result of the introduction of appraisal requirements of the principal by the board which were embedded in the Employment Contracts settlement by the Ministry in 1998.

In the Employment Contract, in terms of the board's role as an employer, the following measures were adopted:

(a) The Board was required to act more decisively as an employer of the principal utilizing:

- its power to control principals' tenure.
- its discretion to award or withhold supplementary grants
• its powers of accountability under annual reviews (MOE 1998b, p. 7).

In this contract round, the government competitively increased control over primary principals by playing them off against their secondary counterparts, bringing them in line with the same limited tenure individual contracts that secondary principals already had in their contract (MOE 1998a). The board could use this fixed tenure clause (eight years for existing principals and five years for newly appointed ones) to reward or punish principals as it saw fit, when it came time to renew or terminate the principals' contracts. There was no requirement for boards to justify their decision not to renew a contract, even if the principal had been doing an exemplary job.

Supplementary grants payable annually at the board's discretion were linked to the performance agreements of both primary and secondary principals, and again could be used as a 'stick' or 'carrot' by the board. Boards were required to scrutinise the performance of the principal through an appraisal and annual review against nationally defined professional standards (MOE 1998b). For a teaching principal this meant being held accountable against 38 standards, which were a combination of those for a teacher and a principal.

The following example illustrates the types of tensions which arose between boards and principals as a result of the increased accountability. Collins (1999) found in the case studies he conducted on principal appraisal that there was considerable change in the power relationship between the principal and the board, brought about by the introduction of professional standards in the 1998 Employment Contract for principals. This caused some boards to display more overt power over areas previously seen as the professional domain of the principal, which might lead to a breakdown in the relationship. As one of the principals in his research remarked about the board chair's role in the appraisal process: 'Dick's a farmer. I'm a teacher. I don't expect to be able to advise him on
farming. Nor do I expect him to be involved in advising on my teaching' (1999, p. 32).

Regarding the principal's role as an employer, the following measures were adopted in the contract settlement:

(b) The principal was required to act more decisively as an employer of staff utilizing:

- remuneration units (‘R’ units).
- annual performance review.
- increments for promotion.
- competency procedures (MOE 1998a, p. 7).

Under a system of incentives and disincentives called ‘R’ units - that is, remuneration units for staff - used for the purposes of responsibility, recruitment, retention and reward under the school's remuneration policy, the principal had discretion to reward staff who were performing well. These reward or 'carrot' incentives included the use of remuneration units for management responsibilities (‘M’ units). Each of these units were fixed term and worth $2,350 annually as additional salary (NZPPTA 1996; NZEI 1998).

All teachers were required to undergo an appraisal and annual review by the principal or delegated person, against nationally defined professional standards (MOE 1998c). Principals now had discretion to award or withhold previously automatic annual salary increments according to the performance of staff, as determined by the annual review. Principals also had enhanced powers to speed up competency procedures where teachers were causing concern (NZEI 1998).

The 'softening-up' policy shifts mentioned earlier, that occurred with the change of government to the Labour Coalition in 1999, were partly a result of increasing tensions between boards and principals resulting from the
new industrial relationship that reflected the managerialist and market New Right measures of the Employment Contract. Minister of Education Trevor Mallard, who had had a career in education, immediately abolished the principal’s bonus scheme, and as of right built the supplementary grant into basic salary, avoiding the possibility of some boards withholding bonuses from principals, as had previously been the case (MOE 2000b). In October 2000 he also abolished individual contracts for principals and principals were put back on permanent tenure.

The 2000 Education Amendment Act also ruled out the vexed question of national testing for primary students, which had been first suggested in the 1998 Green paper ‘Assessment for Success in Primary Schools’ and which was clearly meant to link student results to principal performance and review. In addition, in March 2001 a parliamentary select committee was told by the Secretary for Education, Howard Fancy, that ‘there was no specific work going on in the ministry linking teachers’ pay to the educational achievements of students’ (cited in O’Neill 2001, p. 173).

While these measures suggest an alternative employment agenda to the National Government’s managerial and market focus, it is also likely that the change in direction was a result of a growing realisation that there was a morale problem with the principalship by 1999. A number of ERO reports (ERO 1996; ERO 1998b; ERO 1999b; ERO 2001b) had identified problems in small schools, high workloads of teaching principals, and concerns about the primary principalship in general. Wylie (1997) reported on low morale of principals, high turnover in employment especially in rural areas, unsustainable workloads, and community discontent impacting on some principals. Lovegrove (2000) suggested that whatever political party won the 1999 election, something had to be done to reduce principal dissatisfaction.
Implications for Principals and Boards

There are three main anomalies about New Zealand's particular self-managing model which I wish to discuss in the light of current employment arrangements and the implications for principals:

1. The one self-managing model does not fit all schools;
2. The role of the principal as both an employee and member of the board is contradictory; and
3. The self-managing model is only a semi-managing model in reality, as the board is prevented from being an employer in the classical market model sense because all the employment contracts for its employees are negotiated centrally in managerialist fashion.

1. One model does not fit all
The self-managing model of boards of trustees appears to work well in some schools, but appears to be a failing model in other schools (Collins 2003). Many large urban schools with high or middle socioeconomic communities are thriving under the new system, while some small isolated rural communities and lower socioeconomic communities find it difficult to sustain their schools in a viable position. The East Coast, South Auckland and the far North are three such areas (MOE 1999; Prestidge 2000). As Lauder et al. (1999) says:

School organisation, management and market sanctions and incentives are not the key factors in school success: the prior achievement, social class, ethnic and gender intake and mix of a school are crucial to its success (Lauder et al. 1999, p. 135).

By 2000 these structural differences and difficulties had created an unofficial continuum of desirable and less desirable schools. The desirable schools were typically large, urban, white, middle class and high decile
schools, reflecting the well-off community they served. They also typically had waiting lists of students vying for places, a stable, experienced, older teaching workforce and an older, experienced, (usually) male principal. These schools tended to be well maintained and well equipped and many were adding new administration blocks, state-of-the-art technology teaching centres, and the like. Many had also benefited profitably from the market practices initiated in the 1990s, such as bulk funding and de-zoning.

The less desirable schools were typically smaller, located in rural areas or low socio-economic city areas, often with ethnically diverse populations, tended to be working class communities and were lower decile schools. Many of these schools had falling rolls and found it difficult to attract a stable, experienced teaching staff. Staff turnover was high. Young males or older women were usually employed as principals at these schools of lower status. Many of these schools were run down and poorly equipped, and there was often very little financial support from the community. Board members typically lacked the expertise necessary to govern a school, so principals carried the triple burden of management, governance and teaching responsibilities, as most were teaching principals (Wylie 1999). These were the schools that were 'failing', in the market discourse.

As mentioned earlier, as a result of a number of highly critical ERO reports, the Labour Coalition Government put in place 'pull-back' policies to level the playing field, resulting in support projects such as the Schools at Risk project, the Schools Support project and the Schooling Improvement Initiative to try to counter these problems (Hawk and Hill 2000; Prestidge 2000; Hawk and Hill 2000b). However, in terms of shifts in policy around principal appointments there has been no softening or pull-back from the market position, leaving the field as unregulated as it was at the beginning of the reforms. It has been my observation, in six years of contract work, that with the growing polarisation in New Zealand schools, the schools most in need of a high quality principal are sometimes the least likely to get one.
2. Principal as employer and employee

The second anomaly is the contradictory position of the principal as both an employer and employee in the self-managing model. This is at best confusing and at worst probably not legally viable in most systems. At the outset of the reforms, then Minister of Education, David Lange was determined not to cast the principal into the role of CEO as in the business or state-sector model. He was determined to preserve the role as that of liaison person between the State and the community, and also the profession and the lay public, which fitted the partnership model. The Education Act 1989 clearly spelled out the partnership intent, with the board as the sole employing body. Under Section 75, the board had complete discretion to control the management of the school as it saw fit, and under Section 76 the principal had complete discretion to manage the school’s day-to-day administration as s/he saw fit.

The Lough Report (1990), which immediately followed this Act, had a different agenda. It clearly favoured the CEO model, and the recommendations made in the report outlined how personnel matters needed to be devolved to the school, including bulk-funding teacher salaries and introducing pay flexibility. While these recommendations were not accepted immediately, some were phased in over ten years as the government introduced them in bits and pieces of legislation, including employment contracts. Thus the partnership model of Lange’s original vision was slowly replaced by the market/managerialist CEO model.

This evolving situation created difficulties for boards and principals as they struggled to keep pace with their changing roles and responsibilities and their employer/employee relationships. As a result, differing practices have occurred all over the country. Many secondary schools, already used to the CEO model because of their pre-existing governing bodies, continued on as before. Many primary schools also adopted the CEO model, while others worked more closely to the partnership model. The performance
management guidelines (MOE 1998b), however, spelled out the roles of both board and principal along CEO lines, leaving all schools in no doubt.

It is, however, an unusual CEO model, as already mentioned, in that it leaves the principal in a double bind, being both an employee of the board and an employer, as a member of that board. No other CEO model in the state sector does that. The usual practice is that the board or council employs the CEO who then is delegated to employ other staff, but does not sit as a member of the board/council.

3. The semi-managing model
The original self-management discourse of 1989 was intended to appeal to the lay public of New Zealand because it promised a partnership role to parents and some power and control on matters of the education of their children. While this discourse appeared successful in attracting membership to inaugural boards, many parents have since found themselves increasingly involved in carrying out central government managerialist requirements, and less and less involved in decision making on matters of educational substance (Wylie 1999). In terms of employment matters, boards of trustees retain autonomy regarding the choice of principal, but most of the related personnel matters are centrally decided by Acts of Parliament or by the Ministry of Education without any consultation with boards. In the classical self-managing model derived from the market model (Chubb and Moe 1992), employers would decide whom they wanted to employ and how the employee would work for them. They would be responsible for negotiating their own employment contract with employees, thus determining how their goals and strategic plans would materialise.

This aspect has been denied to boards of trustees in New Zealand, resulting in a model that is only semi-managing, confusing and contradictory. According to John Hannan (2001, p. 1), a leading educational lawyer, this situation where "the role of employer is "split" between a notional employer who negotiates employment agreements
(the State Services Commission delegating to the Ministry of Education) and a "real" employer responsible for hiring and firing (the board),
accounts for the disproportionate number of leading employment law cases in recent years which have involved boards of trustees. Boards are getting into legal trouble because of their confusing and contradictory status and roles.

It could be argued that the New Right agenda never intended to release significant power and control to boards, and that the initial partnership discourse sold to inaugural boards at the beginning of the reforms was simplistic and prescriptive, with propaganda overtones such as 'You will now have a say in making sure your child's school meets his or her needs' (Government 1989c, p. 1). In fact, the last fifteen years has seen a tightening up of the employment regulations and powers of both boards and principals, leaving no doubt that central government is still in control.
The clash of market and managerialist discourses inherent in the semi-managing model demonstrates this tension of contradictory and competing agendas, when the government decides the free market opens up too many possibilities for boards, and controls are needed to rein them back to central management.

Summary

In this chapter I have outlined the recent history and context of the reforms, the legislation and related discourses that arose out of this period, and the role of the board relevant to the employment situation of principals in New Zealand primary schools. This has provided a contextual background in which to begin to understand and identify the issues that impact on women and the principalship. As we have seen, women principals are not being appointed to principal positions in New Zealand in proportion to their numbers in the teaching workforce. Those that are appointed appear to be ghettoised into the least desirable schools. These are the smaller, difficult to staff, ethnically diverse, lower socioeconomic
schools, the majority of which involve teaching principalships with the highest workloads and stress factors (Wylie 1998). The EEO provisions in the State Sector Act 1988 appear to have failed women by not bringing about a significant shift in the diversity representation of the principalship. The lack of systematic training provisions for boards of trustees in selection procedures of principals, and the absence of monitoring procedures of this process, have also impacted negatively on women.

Boards have been given significant powers as gatekeepers of women’s access to the principalship, in the way they are constituted, with unlimited powers and autonomy to make whatever decisions they like in regard to the appointment of a principal. There is no mandatory training for principals. This allows for and widens the pool of potential applicants to include young inexperienced males, who frequently win positions over more experienced women. The managerial approaches as to how schools ‘should’ be led also have gender implications for boards of trustees’ beliefs about ‘the best person for the job’.

The next chapter reviews the literature on the ways women have been discursively positioned and constructed in terms of leaders in education in the last half century. This provides a useful point of analysis on how these discursive constructions are called upon and used by boards in their decisions about the ‘best person for the job’. The second part of the chapter briefly reviews aspects of the literature on boys’ underachievement as it impacts on the way boards call upon and interpret the populist discourses surrounding it, and use them to justify their decisions about women as leaders.
CHAPTER FOUR
THE DISCURSIVE CONSTRUCTION OF GENDER AND LEADERSHIP

Introduction

There are two distinct but related gender discourses that contribute to the way women are represented in the principalship. The main one involves the way women have been discursively represented as leaders in the educational leadership literature over the years, while the second one, which has more recently impacted on this, co-exists uncomfortably with discourses about boys' education, especially underachieving boys, and masculinity in crisis. This chapter provides a review of the international and New Zealand literature of both discourses. These discourses are called upon variously and in specific school contexts to mediate and justify decisions about the principalship.

(A) Discourses of Women and Leadership

In the first section of this chapter I look at the way women have been discursively constructed in the international women and leadership literature, and how the literature has 'problematised' the seeming lack of women in leadership positions in education and the different theories and lenses through which to view the immensity and persistence of this problem. I focus largely on the feminist literature in this review.

The dominant discourses identified in the women and leadership literature relate to issues of language, power and the positioning of women. My understanding of language and discourse in this context refers not just to talking and interacting with common sets of meaning and values as words and ideas, but also as practices that develop in social groups. Some of
these practices can become associated with power or as 'conscious, organized and controlling aspects of discourse' (Davies 1994, p. 17). Feminists have long argued that binary oppositions silence and give precedence to some meanings, and that oppositions are not natural but constructed 'for particular purposes in particular contexts' (Scott 1988, p. 38). Capper (1993) reminds us to ask who is articulating the discourse and what the source of authority is, so that it is possible to examine the ways in which the discourse is maintaining the status quo and the power inherent in that. Even more discerningly, Blackmore (1999, p.16) discusses discourses shifting 'to accommodate, modify, appropriate and resist more disruptive elements in order to maintain hegemony', such as the new management theories 'incorporating, co-opting and transforming more emancipatory feminist leadership discourses'.

These views of power provide a useful way of interpreting the way women are discursively positioned in terms of leadership, as well as the ways they struggle and resist these dominant discourses. Power and the exercise of power is problematic for women, because of the way gender is formed within the discourse (Scott 1986; Davies 1994), so many women, who occupy a subordinate position in the discourse, can only speak and act within the parameters of that discourse. Men, not women, have traditionally been granted the authority to initiate the discourse within the field of educational administration. This was certainly true of the educational leadership discourse before early feminists such as Schmuck and Shakeshaft entered the field in the 1970s.

The theoretical use of gender as a means of analysing social relations is a relatively recent pursuit (Scott 1986). In the field of educational administration the focus on gender began in the late seventies (Grogan 1996; Capper 1998). In 1989, Charol Shakeshaft documented a landmark contribution to the field in her exploration of the androcentricity of educational administration. She problematised how theories of educational administration were carried out by men, for men and about men. Most of the literature prior to this period showed low numbers of women working in
this area and questioned why there was this imbalance. Shakeshaft's main argument was that much of this early research was based on a 'deficit' model that measured women against traditional male norms of aspiration, and that there were both structural and attitudinal barriers operating, which discriminated against women. She demonstrated by citing extensive research and from a cultural feminist viewpoint that women lead in significantly different and superior ways to men, based on their socialisation. While later theoretical perspectives have critiqued her work for its essentialism, Shakeshaft's contribution needs to be acknowledged as important in its time.

The literature ranges over a wide variety of reasons for the under-representation of women in leadership, depending on its theoretical and discursive orientations. For the purposes of this thesis I look at this literature under two main headings. Under the first heading is a collection of work which could be read as positioning women as 'the problem', while the work under the second positions the masculinist nature of leadership as 'the problem'. I am aware that placing the literature into two distinct categories is falling into the 'dichotomy trap'. But much of the literature has relied upon a gender polarity that is essentialist, and that does not see masculinity and femininity being constructed in relation to each other. This polarity is reflected in the following ways in which the literature can be categorized.

(i) Women as 'the Problem'

Liberal, radical, cultural and socialist feminist theories have all contributed to the theoretical claim that historically women have featured in society in the private rather than the public sphere (Dinnerstein 1976; Ehrenreich and English 1978; Reiger 1993), and so have not been granted legitimacy in public roles of leadership. Radical feminist theories about patriarchy, liberal feminist theorising about gender roles, and Marxist feminist theory about the sexual division of labour and the gendered nature of careers
elaborated on how structures defined women’s positioning in society. Traditionally males have occupied, legitimated and defined the public leadership space through their capacity to structure the state and work places in their own interests. When challenged, it is in the interest of the status quo that privileges male interests to position women as the problem. This is because of the political, economic and social privileging of ‘male as norm’ and the conceptualising of women as ‘the other’, as disadvantaged, deviant or cast in the deficit model.

Beginning with this theoretical platform, I discuss the literature in the following section, as I see it positioning women as ‘deficient’ and as ‘victim’. The literature that depicted ‘women as deficient’ focused on the internalised barriers women face. These studies are concerned with the low numbers of women in leadership positions, women’s so-called lack of confidence, the fear of applying, the need for mentors, and so on. Much of this literature which assumes women’s inadequacies is based on very little research evidence but is voiced as ‘commonsense’ explanations in the literature on education management of the 1950s and 1960s, but with particular psychological assumptions about women as not having the necessary attributes (Ozga 1993). Most of it is flawed in that it is grounded on concepts of essentialism or biological determinism. Yet this literature has produced pervasive discourses that appeal to the commonsense of those in society interested in retaining the status quo in which women are depicted as being more suitable to particular roles. This discourse was frequently called upon by boards of trustees in relation to women as leaders, in terms of whether they had the psychological and physical capacities to do the job.

The second body of literature describes the structural barriers women confront in their pursuit of leadership. This literature includes the studies about historical, cultural and socially constructed barriers, such as the sexual division of labour, glass ceilings, juggling work and family, lack of CEO commitment, and discrimination in the workplace. Feminist theorising during the 70s and 80s informs many of these studies,
particularly Marxist and socialist feminist theory, producing a discourse of women as victims of societal forces out of their control. Many women in this study who had been unsuccessful in gaining principal positions called upon this discourse.

(ii) Masculinity as ‘the Problem’

This literature encapsulates the notion that the leadership culture is alien to many women because of the subtleties inherent in its pervasive ‘masculinist’ assumptions, practices, images and language. The effect is that there is little to attract women to educational leadership, and once in the job they feel excluded. Thus both the perception and practice of what constitutes leadership becomes problematic (Blackmore 1989). This literature was also informed by cultural feminism which saw gender as socially constructed historically so that different masculinities and femininities were defined in relation to each other, but in particular to dominant norms of masculinity (Connell 1987, 1995, 2000). Due to the masculinist nature of organisational cultures, men usually act as gatekeepers, creating an environment often hostile to women and therefore women are put off (Parkin and Maddock 1993; Gherardi 1995; Itzin and Newman 1995; Blackmore 1999). Women are also ‘socialised’ into this culture and the research on mentoring focuses on women gaining access to the dominant masculinist culture. Other perspectives are more critical of the masculinist culture as being disempowering for men and women (Blackmore 1999, Connell 2002). Another subset focuses on women’s styles of leadership and how women’s styles are not valued in dominant masculinist cultures. These studies are examined more closely in the next section.

Schools and boards have particular cultures that work in and through their student and parent composition, location, history, educational focus, position in the market and the disposition of boards towards market and management. Through the process of selection to the principalship, the boards of trustees both are informed by and inform particular
understandings about the school's culture and how it is perceived. Women also have to learn to negotiate dominant masculinist cultures, both in gaining access through selection and once in leadership.

Shakeshaft (1999, p. 113-115) uses a six stage developmental framework to review the literature and research on women and gender in educational administration. My framework for reviewing this field of literature overlaps her stages three to six, which are:

• Women as disadvantaged or subordinate and identification of the barriers to advancement of women in administration;
• Women studied on their own terms, so that the view of the world is from a female perspective;
• Women as challenge to theory with the realization that theories don't always work for women; and
• Transformation and reconceptualisation of theory to include women's experiences, particularly in relation to organisational behaviour.

Having provided the framework to review the literature on women and leadership, the next section examines that literature in more detail under each of the main headings.

(i) Women as ‘the Problem’

A great deal of the research in this category has been done by women about women, and has not consciously set out to position women as the problem at all. In fact, it has set out to provide convincing arguments which demonstrate all manner of hurdles, barriers or obstacles which impede women's progress toward leadership. In Shakeshaft's frame this matches stage three - 'women as disadvantaged or subordinate'. This literature is a valuable contribution to the field in detailing the historical construction and reproduction of discrimination, and the structural, psychological and social factors influencing women's opportunities (Blackmore 1989).
The 'problem' with this analysis, according to Grogan (1996), rests with the underlying assumption that the course to be run, along which these obstacles fall, is uncritically accepted as legitimate. The career path or steps in promotion to the principalship or leadership position is accepted as the norm, even by the women stumbling along it. The analysis that is missing from most of these studies is that the path itself is a patriarchal structure, designed specifically for men, tailored to suit their needs and watched over by the old-boys' network, and remains unquestioned or unchallenged in the studies. Instead, as many of the studies show, women who succeed in this field do so by working twice as hard (Edson 1981), or by buying into the male model, a' la Margaret Thatcher. For those who do not make it, or choose not to, then it is seen as 'their' (meaning women's) problem. The discourses in this field of literature focus on the structural and internalised barriers to the promotion of women into leadership, as the following discussion shows.

Internalised Barriers

This literature casts women as 'deficient' for reasons of failure to measure up to the 'male as norm' model. This failure is seen to be located within women themselves, and it is perceived that they 'lack whatever it takes'. In true binary fashion, women count as 'the other'. The socio-psychological theories of the 1970s of women's incapacity to lead, their 'fear of success' and 'lack of aspiration' informed much of this literature and has been used unproblematically to explain the under-representation of women in educational administration. This discourse was used by two of the national policy 'élites' interviewed in my study, reported later, to explain the disproportion of women in the principalship.

Invisibility

A lack of presence of women in educational leadership is the subject of much research. There are many studies internationally that show women clearly are not getting to the top of the profession in significant numbers (Schmuck, Charters & Carlson 1981; Tyack and Hansot 1982; Shakeshaft
When a profession such as education has a large pool of female employees at lower levels, logic would suggest that a representative portion of those qualified and experienced women would move up into managerial ranks. The fact is, they do not.

Women are largely absent from educational management or, as Ozga (1993, p.3) puts it, 'they are the exception when they might be expected to be the rule'.

This is confirmed in the Australasian literature. In New Zealand it is seen as an anomaly, with little movement since the reforms (Slyfield 1993; Pringle and Timperley 1995; Wylie 1998; MOE 1999a). In relation to my study of women principals in primary schools in New Zealand, women are 82 percent of the primary workforce, and 40 percent of the principal workforce (MOE 2002). Hede 1994 (in Still 1995) predicts it will be 2066 before women reach 50 percent of the managerial category in education in Queensland. Jill Blackmore (1989) demonstrated that in spite of equal opportunity legislative and policy initiatives in the 1970s and 80s in Britain and the USA and Australia, the number of women in leadership positions in education decreased (Yeakey, Johnston & Adkinson 1986; Sampson 1987, in Blackmore 1989). Liberal feminist theory informs the majority of these types of studies, utilising interventionist strategies and statistics to document and point out social injustice.

**Aspirants not Applying**

One reason commonly given for the low representation of women in the principalship is that they do not apply for these positions. This was the most common 'explanation' given by men in the EEO seminars I conducted nation-wide over six years. It is difficult to establish whether this is a convenient myth that once more puts the blame on women's
deficiencies, because there are few studies and statistics to counter this claim. The Ministry of Education has not kept statistics on applicants to the principal's position since the beginning of the reforms, even though this was standard practice by Education Boards beforehand. Tyack and Hansot (1982) go so far as suggesting that absences of these kinds of databases are no mistake and that there is a deliberate 'conspiracy of silence', so that it is difficult to know how the makeup of the profession may be changing towards a more inclusive ratio of gender and race. Marshall (1997, p. 26) also sees governments' failure to document women's under-representation in this area as 'legitimising and reinforcing an area of silence [and that] sometimes it is difficult to see areas of silence and neglect'.

**Lack of Confidence**

The explanations for the 'problem' of the low numbers of women in educational leadership that has dominated the social science research during the 1970s and 80s have centered around a 'deficiency' model in theorising about women (Blackmore 1989). Women have been constructed as failing to aspire, lacking in confidence or self esteem, fearing success or being too passive or non aggressive to fit the leadership mold. This list is extended in Still (1995) to include lack of ambition, ability or experience, unwillingness to take risks, failure to plan careers, and lowered aspirations.

Interview situations requiring displays of power and assertiveness are believed to be uncomfortable for women (Chapman 1990; Bloomberg and Holden 1991). Women, it is said, need far more encouragement than men before they feel confident about applying for promotion (Chapman 1986, Sampson 1987, both in Limerick 1995). Men will apply on average 10.7 times, compared to 3.8 times for women (Limerick 1995b).

An aspect of much of the mentoring literature (Daws 1995; Limerick and Heywood 1993, in Limerick 1995b) has focused on the emotional support and confidence-building which occurs during the process which is seen as
necessary for women to feel comfortable in management contexts. Shakeshaft (1989) cautions against calling this a failing of women, and claims it is due to their lack of experience in the public sphere, or failure of the public sphere to recognise the importance of social and emotional factors.

**Structural Barriers**

In this literature, which has been framed within radical feminist theory, there is a shifting in the blame factor away from the inherent qualities of women to a recognition that many barriers are historically and culturally constructed and are outside the control of women living in a patriarchal society (Schmuck 1986). Within this framework the barriers are understood to be literally 'man-made'. Radical feminism theorises women as a social class, which is seen to be oppressed and dominated by men as a social group, within the system of patriarchy. It is the 'power' of patriarchal domination rather than 'difference' that determines the relationship between men and women (Rowland and Klein 1990). A women-centred approach is seen to be the only political strategy to 'survive' patriarchy, and this is articulated in research about women's experiences, by women. A good deal of the research in this category draws on women's experiences and their own explanations, which makes a significant contribution to theory as it 'recasts some of the deficit explanations in ways which reveal the impact of barriers' (Ozga 1993, p. 7). Much of this literature matches Shakeshaft's stage four (women studied on their own terms so that the view of the world is from a female perspective), and emerges from studies of women on their own terms.

**Analyses of Discrimination**

This literature is filled with stories and experiences of women who have suffered discrimination of all kinds in their pursuit towards advancement in educational administration (Schmuck et al. 1981; Ozga 1993; Acker 1994; Hill and Ragland 1995; Hague 1998). As an example, Limerick (1995b, p. 75) cites a deputy principal:
Jill suggests that discrimination is subtle and difficult to counteract in that she was told that 'she didn't have the appropriate profile for an upwardly mobile woman' rather than being given evidence of actual weaknesses to address. Unlike men, she argues, women are promoted on their achievements, not on their potential, and have to prove themselves over and over again.

Discrimination can occur at a broader level as well as a personal one, and can be both overt and unsubtle. An example from my own bank of anecdotes involves an acting principal talking to her board chair. He was explaining to her that a certain classroom was being reserved for the new principal 'when he is appointed'. The closing date for the position was a month away and the acting principal had been going to apply for the job up to that point. 'War stories' such as this were told regularly in the course of my research, leaving me in no doubt that the literature on discrimination holds as much relevance today as it did thirty years ago.

'Sex discrimination is the name for business as usual in an androcentric world', according to Shakeshaft (1989, p. 96), who cites thirty-four studies in the international literature carried out over an eleven-year period from 1973 to 1984 which document the existence of overt sex discrimination by school boards and boards of trustees. She talks about the ever-present bias from school board members who 'hire those most like themselves, white, middle-aged, Protestant males', whom they feel most comfortable with (Shakeshaft 1999, in Murphy and Seashore Louis 1999, p. 106).

'Cloning' in recruitment is a covert form of discrimination that arises from the notion that people feel more comfortable surrounded by people like themselves (Kanter 1977; Apelt 1995). Burton 1994 (in Apelt 1995) found that many men feel more comfortable working with other men.

In a survey by Coffin and Ekstrom (1979), reported in Shakeshaft (1989), women were given the following reason for not being hired for positions for
which they believed they were qualified. They were not hired because of
custom: men did not want to take directions from a woman and the
community was not ready for a woman administrator. As the authors say,
'these reasons have nothing to do with ability or competence; they all use
as their reason the woman's sex' (1989, p. 97).

**Glass Ceilings**
The use of the term 'glass ceiling' first appeared in a business journal in
1986 (Ramsay 1995), and has been used to refer to a worldwide
phenomenon of under-representation of women in senior management of
all forms of organisations (see King 1993; Still 1995; Hall 1996). Still
(1995) reports on others who have referred to this phenomenon as the
'perspex ceiling' (Smark 1994), and 'glass walls' (Lopez 1992). She
maintains feminists have renamed the phenomenon using a variety of
metaphors, such as the 'greasy pole', the 'sticky floor' and the 'sticky web'
(1995, p. 108). This proliferation of metaphors, each indicating a different
invisible barrier, gives credence to the theory that the pervasiveness of
blockages and barriers to women's career progress is a lot more complex
than the single level barrier at the top (Hede 1994, in Still, 1995).
Accepting this possibility also endorses Auster's (1993) idea (in Still 1995,
p. 49), that the glass ceiling will not be broken with time, because the
glass ceiling is not a ceiling, but 'bias that happens all the time and is both
overt and covert, organisational and interpersonal'. The bias that exists
often stems from what is referred to in Australia as 'the boys' club', while in
New Zealand it is known as 'the old boy's network'.

**CEO Lack of Commitment in Creating Women-friendly Organisations**
organisational culture as a series of social constructions and shared
perceptions which are not stated explicitly but emerge as 'the way things
are done round here' (1995, p. 198), found many organisations to be very
women-unfriendly. This is an example of normalising particular masculinist
practices. Apelt also found this influenced recruitment practices so that
'cloning' occurred, which meant that leaders who 'fill the bill' or 'fit the
Chief executive officers who appointed women were seen to be taking a risk.

**Sexual Division of Labour**
There is a substantial body of research, much of it from a socialist feminist viewpoint, which builds on Marxist and radical feminist ideas and documents the difficulties women experience because of the expectations related to their roles as females and their place in society (Oakley 1974; Ehrenreich and English 1978; Oakley 1980). Socialist feminism amalgamates the concepts of production and reproduction, of capitalism and patriarchy, in a way that does not collapse the exploitation of women into purely economic terms. It points out men also gain from the exploitation of women, not just capital. Hence gender impacts on career paths, as do the biologically determined arguments around women's 'natural' capacity for childcare.

**Gendered Nature of Careers**
Men usually follow the traditional career model, which is unbroken and follows progressive phases including promotion. Women's career histories, however, are more often 'broken' because of responsibilities for childcare (Limerick 1995b). Edson (1981, reported in Schmuck et al. 1981), claims men get into high status jobs merely because they are men. Her study showed they did not need mentors, networks or other advancement strategies to be promoted. Carlson (1972, p. 9) maintains that perseverance helps men achieve promotion:

> Because men are very much in the minority in public schools, because their ranks are rapidly depleted by those dropping out of the occupation, and because they are advanced to administrative posts far more frequently than women, the men who simply persist in the occupation have a high probability of moving up the ladder.
Shakeshaft (1999, p. 107) cites an historical example of gendered career paths, which if it did not reflect the pattern today, could be considered quaint and even amusing. This is from the Quincy School Committee in the 1870s:

One man could be placed in charge of an entire graded school of 500 students. Under his direction could be placed a number of female assistants. Females “are not only adapted, but carefully trained, to fill such positions as well as or better than men, excepting the master’s place, which sometimes requires a man’s force; and the competition is so great, that their services command less than half the wages of male teachers”.

In most New Zealand schools of this size, the principal is indeed usually a man, the vast majority of his staff are female, and he does earn twice as much as his female staff (Wylie 1998). In contrast to men, women have much more ‘complex careers’ (Ozga 1993, p. 2), which are not clear-cut and which do not follow a lineal progression. They follow roundabout or horizontal career routes, and constantly encounter barriers, choices, pressures and problems.

**Juggling work and family**

Womens’ careers are often bounded by the double shift of work and housework/care, needing constant negotiation (Ozga 1993). Acker (1994) says it is not just a double shift but a triple shift for many women teachers with young children: namely work, home and childcare responsibilities. For those who are also studying, it is a quadruple shift. The majority of men are not required to juggle work and family to the same degree during the course of their careers (Watkins and Blackmore 1993).
This area of the literature raises some questions for my research. It could be argued that the way it is theorised, the problem for women of juggling demands from their 'legitimate' private world and the 'illegitimate' public world is one that conservative board members could and do use to keep women out of leadership roles. As the public world changes in ways that increase and emphasise its so-called unsuitability for women, as we shall see in the next section, the problem is compounded. In New Zealand schools, where new managerialism is more advanced than anywhere else in the Western world (Whitty et al. 1998), the women who are in principal positions are mainly in teaching principal positions (Wylie 1997a), working up to twenty hours more a week than non-teaching principals (Livingstone 1999). Those with childcare responsibilities could face a workload comprising multi-shifts, including Acker's three - work (teaching), home and childcare - as well as management responsibilities (for example board of trustee meetings) and possibly even postgraduate study.

**Historically and Socially Constructed Barriers**

Women often are disadvantaged when being considered for leadership positions, in ways that are culturally and socially determined and that they have little control over. Court (1992, p. 182) talks about the hegemonic view that men are more naturally suited to leadership than women. Leaders are seen as objective as opposed to subjective or intuitive, and as rational - again a view that is hegemonically linked to qualities identified as male (Hill and Ragland 1995). In her research, Acker (1989), found that the image of a leader in many selectors' minds was 'male'. This then becomes the norm against which they compare candidates.

In Australia, Blackmore (1993a) discusses how educational administration has been historically constructed as a masculine enterprise. Blackmore uses different images to portray the changing nature of administration. The 'benevolent patriarch' in the late 1800s in Australia replicated the strict division of labour in the family, with the father/principal/administrator associated with discipline, authority and rationality, and women/teachers
associated with nurturing, irrationality and emotion (the cult of domesticity). The image of ‘the rational man’ followed, with the development of educational bureaucracy in the early 1900s through to the 1970s. Informed by Enlightenment ideas of the capacity of man to control his environment and nature through science, this was extended to administration. Science was constructed as masculine and women were excluded.

The multiskilled manager emerged in the 1970s, with a shift in organisational theory towards cultural approaches emphasizing new forms of organisational behaviour such as teamwork, and interactive and communicative skills. There has also been a move in Australia towards the economic rationalism of corporate management. Informed by economic models of human behaviour, the emphasis is on outcomes not inputs. In education this is evident in the push towards devolution as a means to produce efficiency. The concept of the multiskilled manager was useful to think about in my study, as this was what some boards were looking for in a principal.

(ii) Masculinity as ‘the Problem’

Returning to the second category introduced earlier, is the identification of another way of looking at ‘the problem’, which in this case is masculinity. An analysis of this literature reveals that it has developed largely as a result of the limitations of structuralist feminist theories and a need to address these complex issues from other viewpoints, utilising critical and postmodern feminist theory. As Marshall (1997, p. 16) says:

The problem is refocused – it is no longer about women’s differences (often seen as deficiencies) and it is no longer about simplistically identifying barriers that make women victims. Such grounded analyses were important beginnings for developing a feminist theory of the state [creating] useful theoretical tools for
dismantling traditional and gendered assumptions in policy and for including women in the analyses.

This particular literature shifts the focus of enquiry from women to organisational cultures.

Blackmore (1989) believed it was necessary to go beyond the 'liberal interventionist' approach of merely redressing the numbers of women in educational leadership, by reconceptualising leadership as a masculinist construct. This she saw as 'the problem'. She critiqued educational leadership from a feminist perspective, and summarised its main ideological foundations:

The masculine image of leadership in education is therefore historically constructed and maintained by its ideological underpinnings of dominant theories of a value-free science and liberal political theory. Leadership is justified on the grounds of rational necessity, individual behaviours and opportunities, and technically necessary hierarchical social arrangements. Founded upon a positivistic epistemology which separates the body from the mind, which extracts feeling and emotion from the material, leadership is defined to be a rational, cognitive process (Blackmore 1989, p. 119).

Grace (1995, p. 187) agrees when he makes a plea for new concepts of leadership: 'Patriarchal and male power has shaped the construct of leadership, its culture, discourse, imaging and practice for centuries'. The literature discussed in this section most closely matches Shakeshaft's (1999) final stages (five and six), which challenge and transform theory to include women's experiences, particularly in relation to organisational behaviour.
Organisational Culture

This literature highlights how organisational culture, or 'the way things are done around here', is gendered, and the impact it has on women. Organisational culture does not take into account the systemic power relations such as the impact of class, patriarchy, and ethnicity, which a socialist feminist analysis would contribute. According to Itzin (1995, p. 48):

The literature provides a picture of organisational culture as gendered, and discrimination based on gender as embedded in organisational culture. But it falls short of conceptualizing a 'gender culture' per se within organisations and fails to capture the systematic power relations which are gendered and which permeate the culture and practice of organisations.

Itzin found characteristics of the gender culture include that it is hierarchical and patriarchal, sex-segregated, sexist, misogynist, resistant to change and that power is gendered (1995, pp. 49–51).

Three further themes of gendered organisational culture arise from French's research (reported in Itzin and Newman 1995). First, she shows how senior men influence the culture of the organisation with long hours and macho language. Second, she demonstrates how power is synonymous with the senior management role. Because this assumes a distinction between public and private work, it is assumed there will not be a necessity to juggle both. Finally, she describes how the bureaucratic structure is seen to be asexual where the rational–legal culture is supposedly gender-neutral, but disguises the gender interests it serves.

Gherardi (1995, p. 13) found certain discursive cultural practices of the organisation positioned women as less valued and powerful. These were evident in a myriad of ways including the speech and jargon used by men,
their appearance, the celebrations and ceremonies participated in, the way
time, resources and technologies were used, and values and patterns of
behaviour.

A gender typology of organisational culture, which clearly illustrates a
masculine tone, arises out of Parkin and Maddock's (1993) work. They
found that some organisational cultures are like the 'gentleman's club',
paternalistic and overprotective; others resemble the 'barrack yard' where
there is a bullying hierarchy; yet others have a 'locker room' culture based
on sexuality, and which excludes women. Some are gender-blind,
pretending differences do not exist; others are the 'feminist pretenders'
where men assume the feminist mantle; and most recognisable of late is
the 'smart macho', where profit is all that matters.

More recently, Alvesson and Due Billing (1997) warn that organisational
cultures and ideas about gender are dynamic and change over time. They
theorise from the viewpoint that work organisations offer complex
understandings about gender, and that it is important to look further than
gender discrimination and obstacles to the realisation of equal
opportunities in work organisations, or male domination, female
victimisation and lost opportunities. Gender is a historical phenomenon
and will be understood, developed and changed differently in different
cultural contexts and times. Men, women and gendered practices are
dynamic and they will be different now to what they were a decade ago. In
this sense Blackmore (1999) also demonstrated that while the
masculinised culture of leadership in the context of restructuring in schools
does privilege some men, it can also be as disempowering to as many
men as women.

In an earlier study, using a poststructural approach, of seven Australian
women administrators in a state education bureaucracy which had a
largely masculinist culture, Blackmore (1993b, p. 75) discussed how
women's interests are 'marginalized, particularised, ignored, subverted or
made "deviant" through the discursive practices of bureaucratic life
(language, myths, symbols, rituals). She argues that such discursive practices produce 'new' versions of masculinity and bureaucratic rationality. She says:

This study draws upon the tradition of cultural studies which sees organisations as contested sites in which certain cultures are hegemonic and other cultures, whilst sharing many organisational values, rituals and symbols within the dominant culture, are subordinate and positioned as 'other' (Bates 1988). This differs from the functionalist view of culture now popular in mainstream/malestream organisational theory, which perceives organisational culture to be homogeneous and tangible, and capable of manipulation in ways to increase productivity and organisational control' (1993b, p. 75).

She argues that theorising from the perspective of both gender and sexuality means thinking of the notion of organisation itself as problematic. This involves deconstructing taken-for-granted assumptions about organisations, as well as problematising masculinity and sexuality. The contribution of feminist poststructuralists to this analysis has been to look 'beyond the notion of “role” as a central notion in the social psychology of selfhood, to that of positioning’ (1993b, p. 78).

In agreement with Blackmore's stance on the centrality of gender and sexuality, Sinclair (1998, p. 175) argues for 'the need to deconstruct the traditional but obscured relationship between heroic masculinity and corporate leadership'. She maintains that the 'heroic ideal of leadership', which has its origins in cultural myths of Australian male sexuality, equates to what is celebrated in executive leadership, which 'has come to be identified with a tough stoicism, a rejection of the sentimental and feminine, a belief that the heroism of the bottom line and the balance
sheet is revealed through a phlegmatic and solitary leadership' (1998, p. 177).

The literature on organisational culture was helpful in providing a background to the values and discourses of this culture, which was useful in helping me recognise similarities in the focus-group interviews with boards who adhere to market values. In the same way this literature alerts me to some of the aspects to which women principals may have adapted, or of which they have resisted becoming a part. The following literature looks more closely at the positioning of women to a masculinised organisational culture.

**Women's Resistance to Masculinised Cultures**

The major theme of the resistance discourse is that traditional organisational culture is seen as antithetical to women. Different researchers working within their own discursive understandings have constructed and represented the masculinised notion of management in particular ways. The literature that exemplifies the resistance discourse associates organisational culture with 'male' qualities of rationality, functionality and instrumentality (Marshall 1984; Ortiz and Marshall 1988; Blackmore 1993a; Weiner 1995). The macho culture (Court 1994b) of management, with its hegemonic practices and values, is presented as alien to many women who make informed choices not to be part of it and who consider 'the price is too high' to enter management (Al-Khalifa 1989; Giles 1995; Limerick 1995b). This has implications for strategies for women's advancement in management, because as Ozga (1993, p. 9) maintains, 'it moves us on from the need to remove structural barriers (though that need remains) to the need to redefine what counts as good management practice'. There is an increasing literature that demonstrates just that. Recent studies concerning women superintendents and principals in the United States have found that these women are leading in
significantly different ways to the established male norm (Grogan 1996; Brunner 1999; Brunner 2000; Smulyan 2000).

Also, as studies document the dominant discourses of educational administration, there has been an emergence of literature that demonstrates the need to redefine, transform and change the culture to enhance the contribution of women in the field. The study done by Gardiner, Enomoto and Grogan (2000) critiques the androcentric culture of educational administration, meaning informed by white, male norms, and argues that this culture, with its unwritten rules, needs to be redefined so that white women and women of colour are included. They refer to changing the rules or the lines that have been drawn, in the name of their book, *Coloring Outside the Lines*.

*The enculturation of women*

The literature which examines how women are socialised into the masculinised organisational culture shows the adaptation processes to which many women are subjected. In an early study informed by liberal and radical feminist ideas, Catherine Marshall (1985) documents the 'enculturation' or socialisation processes of assistant principals into administrative positions in education and the examples of culture shock that many women experience and are forced to repress in order to survive. One participant reports: 'She is told continuously that she will have to budget her time better and that she is too nice to people' (1985, p. 43). Examples of culture shock include discovering incompetence in the current principal; racism; sexism; political fighting; overwhelming, time-consuming tasks; double standards; resistance to bureaucratic structures; and so on. Marshall advocates a closer examination of the organisational environment and ways of redefining and restructuring the assistant principalship.

In later research, Marshall (1991) looks more closely at the environment of new administrators as she examines the unstated micro-political rules, which she refers to as 'assumptive worlds', that dictate the acceptable
values, define the boundaries of work and teach conformity of expected behaviours.

**Socialising through Mentoring**

Mentoring has been presented as another way novices are socialised and made to fit the organisation, and the traditional pro-mentoring literature casts this practice within the androcentric discourse of educational administration, which is designed to perpetuate the status quo (Gardiner et al. 2000). These researchers warn that 'we need to be aware that the practice of mentoring, steeped in the masculine tradition of reproduction of self, dominant values and attitudes, is likely to reinforce a discourse of educational administration no different from the one we have always had' (2000, p. 187).

Arising out of this pro-mentoring literature in education, business and the professions, practices of mentoring women have been critiqued as traditional, hierarchical and uncritical (Stalker 1994). The dominant framework of this literature exposes the power differentials inherent in the mentee/mentor relationships and the possibility for these to be dependent and exploitative. In addition they often perpetuate patriarchal power relationships which position 'superior' male mentors advising and sponsoring 'dependent' female mentees. Ortiz and Marshall (1988) speak of the problematic nature of sponsorship in the literature on organisational socialisation and mobility.

In their study of fifty-one women administrators in mentoring relationships in the United States, Gardiner et al. (2000) found two dimensions of mentoring that did not serve women well. These were the phenomenon of perpetuating the 'good old boys' – using power, privilege and social stratification to gate-keep and exclude others; and the possibility of abusing the position of mentor to exploit subordinates.
Transforming the activity of mentoring so that women are not reproducing the patriarchy but creating alternative models of support is the major finding of Gardiner et al.'s study (2000). They show how women are changing the rules, creating a new discourse and 'coloring outside the lines'. The research includes practices valuing connectedness and caring, sharing knowledge and information, building relationships, and the use of non-competitive and encouraging strategies. Mentors aimed to take their protégés through the stages of initiation and establishment, to maintenance and finally interdependence. While this study sits reasonably comfortably in the poststructural camp, it slides back into a cultural/radical critique with its references to women’s ways of managing, and it privileges the caring, sharing approach.

Women mentors are acting as transformers, according to this research, in three ways. Instead of reproducing protégés like themselves, as males have traditionally done, they value difference and encourage it. Instead of establishing the one-to-one traditional mentoring structures, they are using more collaborative structures such as professional webs or support systems for wider groups of women. And instead of accepting the expert/novice patriarchal relationship, they work actively in a sharing, collaborative relationship with protégés, respecting the wisdom of both players, planning careers together and leading from a philosophy founded on an ethic of care.

**Leadership Styles**

Traditional management and leadership styles have been criticised by feminists for their androcentric values and practices for a number of years (Schmuck et al. 1981; Shakeshaft 1989; Ozga 1993; Dunlap and Schmuck 1995; Blount 1998). This style is portrayed as typically authoritarian, charismatic or entrepreneurial, competitive, linked to success and winning, and concerned with beating down the opposition (Ozga 1993). Leadership traits are represented as male; they are constructed as aggressive, forceful and independent (Blackmore 1989). Feminist critiques show that
men are positioned as more capable of dealing with the management of finance than women (Deem 1989; Deem et al. 1995). This research argues that traditionally men have acted as gatekeepers of leadership models, where they have set the standards and produced the social knowledge. Women and minorities have been excluded from leadership theory and research (Blackmore 1993b; Marshall, Patterson & Rogers 1996).

Although women have been largely absent in the traditional leadership literature, when they do start to appear in the cultural feminist research, they are presented as having styles of leadership that are different to the conventional model (Neville 1988). Characteristics of this style are that it is less hierarchical, more democratic and more affiliative and holistic; it fosters better communication; there is less conflict and domination; and it focuses on a team approach (Pitner 1981; Marshall 1984; Court 1992; Still, Guerin & Chia 1994; Court 1994b). Shakeshaft (1989) found women administrators in education typically demonstrated a style of leadership that valued relationships with others and community building. They also regarded teaching and learning as the major foci of their work.

A major contribution to the literature on female styles of leadership was Carol Gilligan's (1982) 'ethic of care' challenge to Kolberg's (1981) 'ethic of justice' in his gender-blind stages of moral development. This insight inspired many analyses in studies of women educational leaders, further emphasising the caring actions (Beck 1992) and the nurturing relationships (Noddings 1984) indicative of women's administrative style (Enomoto 1997; Strachan 1999). The literature extends to characterising women as collaborative and empowering of others (see Hurty 1995, in Dunlap and Schmuck 1995).

The literature that uses this discourse fits within cultural feminism or relational feminism (Acker 1999), and has been criticised for institutionalising an essentialist view, and universalising for women the caring and emotional aspects of life and work, leaving men to pursue other
avenues. Acker's own research in this area (Acker 1995; Acker and Feuerverger 1996; Acker 1999) demonstrates how the caring 'script' that mimics women's traditional work in the home is called on in the caring professions such as teaching. While women consider they are 'doing good', they often experience 'feeling bad' as they battle factors outside their control, such as critical parents, unruly children and educational reform.

Pringle and Timperley (1995) argue that many of these gender analyses of educational management and administration have taken a 'correcting the record' stance and sought to 'add women in' to the body of knowledge. In New Zealand, this focus was on the experiences and position of women teachers and female students (Court, Jones, Strachan, Middleton, Neville, O'Neill, all in Pringle and Timperley 1995, p. 168).

Adding to the debate, Hester Eisenstein (1993, in Blackmore and Kenway 1993c) critiques theories of gender difference and illustrates the static and limited usefulness of these as they have been used to theorise women's experience of teacher promotions. Using an archaeological metaphor, she describes the layers of ideas about the nature of difference. She maintains that first there was sex-role socialisation and the androgyny model, then the Women's Studies elitist model, and finally Carol Gilligan's moral development model. In her work in the NSW Education Department, looking at EEO and leadership of women teachers, she found these theories inadequate. She says:

I started to understand that, particularly in primary schools, there was an implicit model of leadership which I now call the 'rugby league model'; you know, the front row forward. Leadership was equated with a certain kind of masculine powerfulness, initiative, and 'take-chargism'. It was very hard for the women who were applicants to document an alternative model of
leadership because that had not been spelled out. So in our criteria we were gender blind (1993c p. 5).

Some studies moving towards a poststructural approach propose that it is more useful to understand the multitude of possible positions open to women, rather than to present the essentialising constructs of male and female leadership styles. Coleman (1996), using Gray’s (1989) gender management style paradigms, found most head teachers exhibited both styles (an androgynous approach). Women actively manage their gender in order to survive, adopting a more masculine or feminine style depending on the situation (Pringle and Gold 1990; Pringle 1992; Traquair 1993).

Using a Foucauldian framework, Goodman (1997) found women’s management styles in the early nineteenth century in Britain were simultaneously constructed as powerful and powerless as a result of their positions in society, where they were straddling the discursive space of both public and private worlds. In a different century, Smulyan (2000) found her three women principals in a similar position as they focused on understanding the individual and multiple contexts within which they worked, and on negotiating numerous daily dilemmas, demands, relationships and interactions.

A new definition of leadership in education, including a holistic approach and embracing a wide range of skills, attributes, capabilities and qualities most often attributed to women, is being heralded as the style needed in the twenty-first century (Day 1995). On the other hand, while they acknowledge the recent trends in management theory which celebrate a ‘feminised’ management style, Reay and Ball (2000) argue that the present practice of new managerialism in education remains a highly paradoxical context for women. They maintain that the introduction of the market form, which has transformed education, has had the effect of ‘legitimating and encouraging assertive, instrumental and competitive behaviour’ (2000, p.147).
Context certainly appears to play a significant part in how women (and men) lead. As Reay and Ball suggest, the extent to which context shapes individual principals' actions and perspectives in education has been downplayed in the feminist literature. They cite Blackmore (1999, p. 156), who points out: 'One cannot talk about "women's ways of leading" therefore, without being aware of the structural constraints and discourses shaped elsewhere that undermine leadership committed to such notions of feminist practice'.

An example of these difficulties emerges out of research by Grundy (1993), who categorises educational leadership under three constructs, using Habermas. She describes the practice of 'technical action', which is how most school leaders operate in a managerial climate, 'practical action' and 'emancipatory praxis', which she characterises as feminist practice. In her postscript, however, she describes how difficult it has been for her, as an educational leader, to use emancipatory praxis in managerialist-driven times.

The New Zealand Literature

The literature on women and leadership in New Zealand has in many ways reflected trends and discursive shifts in the international literature, but within a national context. The discursive positioning of women as 'the problem' features large in the earlier literature, as it does in the international literature. The invisibility of women in the field of educational administration and leadership, and the lack of progress in promotion into this field, is referred to by a number of writers and researchers. One of the earliest was Margaret Malcolm (1978), who pointed to the extent of the problem of invisibility and who opened up the discussion about the barriers to women's advancement into this area. These barriers, testified to in a number of studies that followed (TEACAPS 1982; Watson 1989; Slyfield 1993), fit within the 'deficit' model in this thesis. Court (1989) progressed the argument by pointing out that societal structural barriers also hamper women, and later in 1994 (Court 1994b), that hegemonic masculinity
creates and recreates women's subordination, which positions women as 'victim' within my framework. O'Neill (1992, p. 75) added that 'complex webs of power and powerlessness result not only from our gender but also from our ethnicity and our class positioning'.

Fitting within the framework of the 'masculinist' leadership discourse, a few studies have focused on women's leadership styles in New Zealand, complementing the findings of the international literature. Neville (1988) found women's leadership style emphasised relationships, included shared decision-making processes and was empowering of others. Court (1992) refers to 'affiliate' styles when speaking of the preferred leadership practices of women. In an action research project designed to empower women to learn strategies for promotion, Strachan (1993) found the personal values and beliefs of the women's 'private' lives to be as important as their 'public' professional beliefs, and these could not be separated in their pursuit of leadership.

Also within the framework of masculinist culture there are studies in New Zealand of the impact of the New Right organisational culture on women's leadership. Strachan (1994) warns of the difficulties this culture presents for women and for the pursuit of social justice. Hague (1998) and Notman (1997) document the 'gut reactions' and discriminatory decisions boards make around gender in the appointment of a principal in this new climate. Strachan (1995, p. 153) confirms this by stating: 'Entrenched sexist attitudes by board members, conscious or unconscious, can serve to ensure that women are not appointed to the principalship as often as their male colleagues'. Countering this somewhat is a study by Malcolm (2000) who found women were benefiting from the new marketised culture. Since 1997, women principals were being employed at five percent above the national norm in Auckland, the largest metropolitan city in New Zealand. Her study confirmed that women were better prepared than men, for the principalship, in terms of qualifications and experience. The superior qualifications and experience did not go unnoticed by the market-oriented employers. Seventy percent of the women in the study were involved in
leadership study at diploma level or higher, while a large majority of the men were not involved in any ongoing study. Fifteen percent of the women had completed a Masters degree, compared to seven percent of the males (2000, p. 57).

**Context, Gender and Leadership**

The recent international literature in the women and leadership field is confusing and contradictory, as studies emerge demonstrating how the new context since the restructuring reforms offers both more opportunities and more stress for women. In a Victorian (Australia) study by Gourley (2000), there is evidence of both more stress and more opportunities for women in the field of educational leadership. Gourley found that although women were underrepresented as applicants for principal positions, they were relatively more successful than men. In 1999, 15.1 percent of all female applicants for a principal position were successful, compared with 9.8 percent of male applicants. Men also made more multiple applications than women. On the other hand, the study reported anecdotal evidence that increased accountability and workloads of principals were acting as a disincentive to current principals. This is supported by the data which shows there has been a significant decline in the number of applications for principal positions in the last few years, particularly from male applicants. Lacey (2004, p. 8), also reporting on the situation in Victoria (Australia), supported the claim that work intensity is acting as a disincentive to aspiring principals and that the selection processes did not recognise multiple career paths to leadership, which was disadvantageous to women.

In the United States, while the number of women in educational administration programs has increased during the last twenty years, men in these positions continue to outnumber women (Shepard 1997; Pounder, Galvin & Shepherd 2003). In spite of the changes occurring in women's credentialling, there is still evidence of conservative attitudes by school boards towards women applicants for leadership roles. Shepard's study
highlighted board members' concerns about women's emotionality, self confidence, and ability to be aggressive, while Pounder et al. maintain 'women may be relatively invisible because they do not fit the image of the "ideal" candidate, that is, they do not fit the historically masculine image of high-school principal and superintendent job occupants' (2003, p. 137).

Studies in New Zealand (Brooking, Collins, Court & O'Neill 2003), Scotland (Draper and McMichael 2003), Canada (Williams 2003) and Australia (Gronn and Rawlings-Sanaei 2003) also reported principal dissatisfaction, disengagement and declining numbers, for demographic reasons as well as intensification of work patterns. Gronn (2003, p. 115), using Coser (1974), speaks of this intensification as 'greedy work' regimes, claiming 'the school principalship has become an extremely tough and demanding role requiring people with, among other things, multi-skills, boundless energy, stamina, an infinite capacity for goodwill and a preparedness to work long, long hours'. He argues that 'greedy work' regimes contribute to the leadership crisis in educational administration.

For the purposes of this thesis the emerging literature on how women are managing and leading in this new managerialist context (Davidson and Burke 1994; Hall 1996; Gold and Evans 1998; Blackmore 1999; Strachan 1999b; Reay and Ball 2000) provides a useful background to examine some of the beliefs and practices of boards of trustees as they seek to recruit applicants whom they perceive will succeed in this climate.

Summary of the Women and Leadership Discourses

An overview of the literature has helped to identify particular discourses produced by feminist research around women and educational leadership. Whilst a broad field, some aspects of the literature are more relevant than others in this research, particularly in relation to the varied and often contradictory ways that women leaders are constituted by board of trustees. Discourses that position women as the problem, while based on
now out-dated socio-psychological assumptions of the 50s and 60s, are still persistent and pervasive today. Their resistance and resilience is partly due to the reinvention of conservative and commonsense views of patriarchy by populist and media discourses about women (Thomson et al. 2003). As will be seen, these discourses were frequently called upon by boards of trustees as evidence that women lacked the psychological and physical capacities to lead schools.

The discourses produced in the literature that position masculinised culture as the problem, arose out of feminist theorising about organisational culture in the 80s and 90s. These discourses are useful to help make sense of the values of the managerial and market culture which appears to be prevalent in schools in the current New Zealand post-reform environment.

As indicated at the beginning of this chapter, a related literature to the main women and leadership in education one is one about underachieving boys and masculinity in crisis. The moral panic which has emerged partly in response to recent initiatives to improve educational outcomes for girls, has resulted in a virulent backlash against such feminist reforms. However, the populist discourses produced have further reaching effects than this by laying the blame for boy's failure in schools on a feminised workforce. This in turn produces discourses which are taken up by boards of trustees justifying why women are kept out of the principalship.

(B) **Boys' Underachievement and Masculinity in Crisis**

A cursory review of some of the literature on boys' underachievement is important to support my argument that there is a pervasive populist discourse linking the feminisation of teaching, 'failing boys' and the need for more males in teaching. Discourses of 'failing boys' (Biddulph 1997), 'laddish behaviour' (Jackson 2003), 'the crisis of boys' and 'macho masculinities' (Benjamin 2001), pervade media representations as well as the academic literature, and have entered policy debates on education.
These discourses were frequently alluded to by trustees as their justification for appointing male principals. As they were not the only reason cited, however, this review is brief.

It is important to consider why the issue of boy's perceived underachievement has caused such moral panic (Cohen 2002) in recent years. It is considered in populist discourses to be a recent problem, yet, according to John Locke as far back as 1762, boys were reported to have difficulty learning Latin. For centuries girls' education has been constructed as 'the problem', and with good reason. It was considered by many cultures (and still is by some) that it was not necessary to educate girls, as they did not have a public function in life. But as liberal ideas began to flourish in Western society, discourses of a domestic education to enhance private life were expounded as suitable for girls, by educational thinkers such as Rousseau. The challenge to this discourse came from more enlightened liberal thinkers such as John Stuart Mill and Mary Wollstonecraft (1792), who argued that women should have the same educational opportunities as men, and that it was a waste of human capital to deny them a public role in life.

The greatest challenge to this position did not occur until the 1970s with the second wave of feminism. It was realised that girls were not achieving as well as they might in an education system designed around male needs and interests (Arnot 1982; Thompson 1983; Spender 1985; Clarricoates 1987; Sturrock 1993). The changes brought about by the 'girls' underachievement' discourse, which was mainly the work of feminists influencing policy and practice, was remarkable for beginning to turn the situation around in a relatively short time. The 'girls can do anything' discourse came to be seen as threatening to boys in the backlash (Faludi 1991) that followed during the 1990s, where small gains by girls were interpreted as great strides (Epstein, Elwood, Hey & Maw 1998; Lingard and Douglas 1999; Collins, Kenway & McLeod 2000). This was a period of widespread cultural, economic and social change (Kenway et al. 1997b), in spite of the fact that women still earned less than men in the workforce.
and that many girls, particularly from non-white ethnic groups, were still underachieving (Arnot, David & Weiner 1999; Praat 1999).

The focus on girls in the educational discourse lasted no more than twenty years (from the mid 70s to the mid 90s) before the media began to produce alarmist discourses and provoked the moral panic of 'what about the boys?' (Lingard and Douglas 1999). A curious twist of logic appeared to underpin this alarm, so that the media assumed that because girls were doing so well – a misrepresentation of the situation in fact – it must mean they were succeeding at the expense of boys. Other impacting factors such as class and race seemed of no interest to the media so that questions such as 'which boys and which girls' are underachieving (Collins et al. 2000, Praat 1999) were often lost in the debate. Lingard (2003, p. 50), drawing on Bourdieu, described the structural amnesia that operates within media stories. He says, 'media stories do not build upon previous stories and their insights in particular ways in an attempt to move the debate on. Rather, stories on boys and schooling, for instance appear at particular times, and are written as if nothing has previously been said about the topic'.

While several academic studies demonstrate that certain boys are below average in achievement (Maori and Pacific Island boys in New Zealand), Pakeha (white) and Asian boys are still achieving at a higher level than girls in science, maths and technology at secondary school (Alton-Lee and Praat 2001). Pratt (1999) cautions that the most important question to ask is 'Which boys and girls are underachieving?' and concludes that for both genders ethnicity is a stronger indicator of success or failure than gender. International studies (e.g. Kenway and Fitzclarence 1997; Epstein et al. 1998; Raphael Reed 1998) endorse the need to ask which boys, and add class to the indicators of success, as many middle-class boys continue to outperform girls generally.

There are distinct discursive positions that have been taken up in the literature around this topic. The first is the statistical discourse, which
includes the empirical studies that demonstrate international and national student achievement rates on gender lines (ERO 1999; Harker 2000; Alton-Lee and Praat 2001, in New Zealand). Many of these studies have been appropriated and misread by the media to draw attention to the 'plight of the poor boys'. One empirical study in New Zealand (Fergusson and Horwood 1997, p. 94), based on a medical developmental model in a longitudinal study, uses this discourse to argue that more attention should be given to the boys because boys' underachievement is due to their disruptive classroom behaviour and therefore there is 'the need for policies and debates about educational achievement to move away from the narrow confines of gender based theory and toward a more broad based developmental model' (my emphasis). This is a typical example of the 'rational' statistical discourse being used to shape and support the 'men's rights' (Biddulph 1997) discourse, which is particularly pervasive and has been taken up by the media to appeal to a commonsense view which reasserts the status quo of male hegemony.

The backlash discourse which follows from this is the cry for more male teachers to act as appropriate role models. This again is populist and media-fed, maintaining the myth that it is the feminisation of teaching that is the problem. The media have played a strategic role in promoting boys as victims of feminism and women teachers which as Lingard and Douglas (1999) argue, is representing the interests of recuperative masculinist politics. As will be seen, this discourse was evident in every one of the focus-group interviews in my study. Janet Smith (1999, p. 2) claims there is a discursive link between the 'What about the boys?' debate and the 'We need more males in primary teaching' debate.

In Bacchi's (1999) terms, the implied solution to the problem of boys' underachievement is located in the discourse. In other words, it is male teachers who will solve the 'problem' of boys in schools. Smith goes on to argue that many issues are silenced, excluded or assumed in this discourse, and that what we need to explore is the experience of the males who have chosen to become teachers, as well as the needs of the
children who will be taught by them, and that it is important to name and make explicit the problems that these men will supposedly overcome. She maintains that ‘we need good teachers of both genders’ (Smith 1999, p. 10). This is also the conclusion of Livingstone (2003) in a review of the literature about men in primary teaching in New Zealand. The international research does not support the view that boys’ achievement will be higher when taught by male teachers (Elley 1992; Brookhart and Loadman 1996).

The new sociology of masculinity provides a more sophisticated notion of gender by focusing on identities, subjectivities and positioning of the ‘poor boys’ (Connell 1993; Mac an Ghaill 1994; Kenway and Fitzclarence 1997; Epstein et al. 1998; Lingard and Douglas 1999; Connell 2000). Accounts of aggressive, tough, intimidating behaviour (Skelton 1996), ‘being staunch’ (Rout 1992), using violence to achieve status (Measor 1999), ‘laddishness’ hiding a fear of failure (Jackson 2003), fantasies of ‘Macho Man’ (Benjamin 2001), teacher images of immature boys as Labrador puppies who will eventually grow up (Allard 1999), compulsory heterosexuality (Renold 2000), and boys’ sexual harassment of girls in class (Kenway and Fitzclarence 1997) represent some of the constructions of masculinity that the literature reveals. While these discourses could suggest an essentialist portrayal of the old adage ‘boys will be boys’, most of these authors argue from a poststructural perspective that boys choose from a range of subjectivities to act out, mediate or position themselves strategically according to the situation they find themselves in. This raises questions about which ‘images of masculinity’ will be most productive in providing boys with alternative masculinities.

**Discursive Tensions**

Emerging out of the literature discussed in the last two chapters are discursive tensions around gender diversity representation in the principalship, tensions rendered obvious with concerns about the new
demands on schools made by marketisation and new managerialism and the ways in which women are represented as 'fitting' or 'not fitting' these new environments.

The first tension centres around schooling and how it is defined in the new, restructured environment. The dominant discourses driving and emerging from the reforms are the contradictory ones of the dominant market/managerialism discourse and the weaker democratic/partnership discourse. Each represents a different worldview of school organisation and schooling. The market/managerialist discourse suggests schooling should be regarded as a market product, while the democratic/partnership discourse suggests schooling should be regarded as a community good for all citizens. These discourses shift, overlap and disagree (Court 2004) as teachers, principals and board members view and act out their philosophical preferences.

The second discursive tension centres around the discourses about the function of the principalship in the restructured environment. The managerial discourse positions principals in a functional role, part of a managerial cog in the market or in line-management to the centre on the one hand, or a facilitative agent, acting between state and community, in a democratic/partnership defined school. Boards selectively draw from either position depending on their particular logic about what their school is about in relation to community, to other schools and the central bureaucracy.

A third discursive tension emanated from the competing discourses around gender equity where the affirming discourses about women and leadership that arose from the feminist literature and gender equity policies clashed with the increasingly dominant discourse about boys' underachievement, and their need for male role models. This converged with the discourses of deficiency that women did not 'fit' with the new restructured school environments and the function of the principal. Women were therefore positioned on the one hand as deficient or passive (that is,
the problem') within a masculinised organisational culture, and on the
other as multi-talented and facilitative, which sits comfortably within a
democratic/partnership context.

Another discursive tension was between discourses about crises of equity,
as perceived by boards of trustees, and policy discourses about quality
education, gender and educational needs. The focus was on whether
education should be restoring the balance in terms of gender achievement
for boys or whether the focus should be on raising the standard for all
students, i.e. two different conceptualisations of equity and what that
meant for quality. How these discourses were mobilised impacted
significantly on selection processes for the principalship.

At the same time, there were dominant policy discourses derived from the
three main legislative Acts. Each act produced a different focus but
collectively developed discursive logics about markets, management and
gender equity in education. Managerialist discourse dominated in the
Education Act 1989, which embedded the reform proposals of
'Tomorrow's Schools' into legislation. Of particular significance is Section
76 of this Act, which defined the principal as Chief Executive Officer.
Market discourse dominated the Education Amendment Act 1991,
following recommendations from the Lough Report 1990, allowing de-
zoning and parental choice to determine enrolments of children. The third
discourse of relevance is that of equity and social justice derived from the
EEO provisions of the State Sector Amendment Act 1989.

The Argument So Far

The issues so far examined highlight the complexities involved in the
problem of the gender diversity representation in the principalship. The
tensions and paradoxes around notions of leadership, combined with the
contradictory policies and discourses produced during the reform period,
present a confusing and complex context in which to examine board
selection processes. One purpose of my research, therefore, is to explore what is actually happening at the level of board appointment processes, within this complex environment. Another focus is to re-examine explanations for the lack of diversity representation in the principalship and particularly to analyse the selection processes involved in the appointment of the principal in the light of such explanations. A third focus is to examine how EEO policy is articulated at the local board level, because of the paradox that, despite the existence of EEO legislation and policy, there is no evidence of a significant increase in the gender diversity in the principalship, as would be expected. One factor that might explain this is that restructuring during the 1990s meant the responsibility of equity was devolved to local school boards, but these boards are now operating within an increasingly competitive environment between schools that has worked against bedding equity policies into practice (Boston et al. 1996).

It is also important to explain how the various meta-policies produced at the systemic level of self-managing schools, as well as marketisation, EEO, and the lack of credentialling of principals, were called upon at the local school community level in rationalising appointment decisions in ways that contradicted, converged and subverted their original intent. While national policy shaped and informed the discourses, at the local level of practice these policies did not necessarily produce their desired effects. Some discourses were privileged over others in particular contexts, most often those of 'best fit' or market need rather than merit or equity. Paradoxically, my findings suggest that in some situations the market discourse may be assisting the appointment of women candidates.

The Methodological Approach Summarised

To reiterate, this research is exploring how policy discourses that have the intention of increased diversity can be interpreted locally, often but not always in highly conservative ways to the detriment of women. The main tenet of this thesis is not that women are the problem, but that a range of
other factors are constraining the possibilities for women. That is, it is not the way women have been constructed as deficient or problematic, as portrayed in the literature, that is 'the problem', but rather the influence of tensions and paradoxes around the nature of leadership positions in the restructured environment.

The methodological issue is how to explore this complex and seemingly contradictory situation to explain what has been happening. Carol Bacchi's (1999, 2000) ideas around policy analysis and 'policy as discourse', which draw on the new policy of sociology, provide a useful approach here, both in clarifying the research problem and developing a capacity to conceptualise it. Taking regard of her warning about the flaw in conventional policy interpretation, where commonly the solution is foreshadowed in the explicit or implicit diagnosis of the problem representation, I open up the investigation as she suggests, so that competing interpretations of the problem can be explored and analysed in order to progress social change and social justice. Following Ball (1990), Bacchi argues that policy constructs certain discourses at national level. These are then picked up and adapted or rejected at local level. What these discourses are, and how they are interpreted, adapted, articulated and re-articulated by boards in their thinking and decision making around appointments, explicates how local principal appointments are made, often in contradiction to actual intent, largely to the detriment of women.

To reiterate again, Bacchi's model (1999) recommends:

- Identifying problem representations;
- Reflecting on their effects; and
- Probing alternative problem representations and where they might lead.

These organising principles provide the way forward in structuring the analysis of my research findings.
The Way Forward

Bacchi's methodological approach requires an analysis of discourses that are relevant to the field. Those discourses identified in policy documents and legislation have already been discussed in Chapter Three. The discursive effects of these emerge from conversations and discussions with board chairs and principals, at the meso and micro-levels, which are analysed and discussed in Chapters Six and Seven. Chapter Five examines 'what the problem is represented to be' (Bacchi 1999) at the macro-level, where an analysis of the interviews with national 'élites' is discussed. Finally, in Chapter Eight, a discussion of the competing interpretations of the problem leads into a series of recommendations.
CHAPTER FIVE

NATIONAL REPRESENTATIONS OF THE PROBLEM

Introduction

Bacchi’s (1999) methodological approach advocates identifying problem representations as a first step. In line with this, the present analysis begins with the findings of "what the problem" of the lack of gender diversity in the principalship "is represented to be", at the national or macro-level. A statistical overview taken from Ministry of Education databases is the first "representation" that is analysed. This discussion is followed by an analysis of four interviews with national policy ‘élites’ from the central policy agencies. The discourses identified from these interviews provide the second "representation of the problem", and these are discussed in the context of the discourses identified from the document analysis of key policy documents and legislation from Chapter Three. A summarising statement draws together the dominant discourses that emerge from these official representations, as well as the contradictions and complexities involved in the positioning of them.

What Counts as Evidence? A Statistical Representation

In order to interrogate the problem of the lack of gender diversity in the principalship, a clear gender representation of numbers and percentages was required. This was sought and obtained with very limited success at the macro national level. Only two of five questions were able to be answered from statistics kept on Ministry of Education databases:

- The proportion of women principals in primary schools; and
- The extent of the gender shift in the principalship since the reforms began.
The proportion of women principals in primary schools in 2002 when this study was undertaken was 40 percent, which is proportionally less than half of women teachers (81.5 percent) in the sector (MOE 2002). The percentage increase of women to the principalship since the reforms began has been approximately one percent per year. In 1991 women were 77 percent of the teaching workforce but only 27 percent of principals in primary schools (Slyfield 1993). Men are six times more likely to win a principalship than women today even though they constitute only 18.5 percent of the primary teaching workforce and even though women constitute 80 percent of the next level of senior management positions - assistant principals and deputy principals (MOE 2002).

Two other questions which contribute to a more detailed representation of women in the principalship are:

- The types of schools women are being appointed to as principals; and
- The gendered employment patterns and career paths that are emerging since restructuring.

The Ministry of Education does not collect information which would help answer these questions, but Cathy Wiley's research from another central agency, the New Zealand Council for Educational Research, does go some way to producing evidence that provides answers. The studies she did over the decade following restructuring found women were twice as likely to be appointed as principals to small schools; 59 percent went to rural schools; 70 percent to a teaching principal post, and only 27 percent went to major city schools, most of which were integrated (religious) or special character (girls) schools (Wylie 1997a; Wylie 1998; Wylie 1999). The NZ Principal's Federation Survey (NZCER 1997) reported similar findings, as well as women being more likely to gain positions at schools of lower socio-economic status, and to schools with high populations of Maori and Pacific Islands students.
This evidence begins to form a particular representation of gendered career paths, which is built on by other researchers (Livingstone 1999; Whittall 2001) who found men tended to stay for very short periods in similar schools before moving on promotion or to other areas. Livingstone (1999) found women were in the difficult to staff schools, and the schools which had previous problems and a history of high principal turnover. Fifty nine percent of the schools that had had three or more principals in the previous five years were currently headed by a woman. These latter studies are of small regions in New Zealand which limit their generalisability. My research adds further insights into the changing and highly variable context in which gendered employment patterns are emerging, but it is difficult to know with any certainty what national trends or patterns are occurring because of the lack of evidence collected in a systemic and systematic way by central agencies.

The question to which there was a resounding silence within the Ministry of Education databases was:

- The number of women applying for the principalship.

Prior to the 1989 reforms, Education Boards had collected information systematically about who was applying for all teaching positions and who was successful. This is no longer collected centrally, and as such has become something of a ‘black hole’. This issue appears to have ‘fallen off the agenda’; it seems to be of no concern to central authorities and as such it renders part of the problem of the lack of gender diversity as ‘invisible’. Bacchi (2000) maintains it is not just what governments do but also what they don’t do, that is important, and it is silences like this that reveal the way a problem is represented. By approaching the problem as if acting (collecting evidence) is unnecessary, the Ministry of Education is giving a clear signal that gender is not significant to how they represent the problem of the principalship.
The one study that was done by a government body on career planning and teacher interest in the principalship, was done by Wylie (1998) in a NZCER national survey in 1997. Teachers were asked whether they were interested in becoming principals, but there was no gender breakdown of the results. Nine percent of teachers were interested; one third of whom were deputy principals; one third were associate principals and one third were scale A teachers.

The question of whether women were applying for the principalship or not, was critical for this thesis. If they were not applying then it would be no surprise that they were not being appointed. My previous experience working with boards confirmed this assumption as the typical response to the explanation of the 'problem' of the gender diversity representation. Where boards were getting this information from remains a mystery, but it links with the traditional discourses of 'the deficit woman' in the leadership literature, who lacks confidence, requires support and gives up after three unsuccessful applications (Still 1995; Limerick 1995b). This representation was problematic for me, as the discourse produced a highly convenient myth to justify and maintain the hegemonic status quo, as it had successfully done for a decade and a half since the reforms began. Because of the policy silence surrounding the question of how many women are applying for principals' positions, a survey was conducted as part of the research project to establish evidence on the matter.

A postal survey (see Appendix Two) was sent to 150 schools who had advertised for a principal within a six month period in the Education Gazette. Fifty boards replied and the raw scores (see Appendix Five) were converted into percentages. Of the 50 schools, 48 made appointments and women won 23 of the principal positions (48 percent). One school only, failed to attract any woman applicants, while women made 44 percent of the total applications. Women were shortlisted to 45 percent of the positions. On the evidence of this survey it appears women are in fact applying for the principalship in approximately equal numbers to men for these positions, but they are not applying proportionally to their total
numbers in the primary workforce or in proportion to their numbers in
senior management positions. If they were, one would expect women to
make up 81 percent of total applications. It does mean, however, that the
women in this very small sample of 50 schools, are being appointed in
proportion to their applications.

The statistical representation above begins to account for parts of the
gender diversity problem, but as with any quantitative study, it provides
only the bare bones with little of the meat, tough sinews or muscle, which
qualitative research problems require. The tricky questions of 'what has
caused women to remain so grossly unrepresented in leadership', and
'why', remain unasked and unanswered in a statistical representation of
the problem.

National Representations of ‘the Problem’

The following section involves an analysis of the findings of the interviews
carried out with policy elites working at the macro-level who were in a
position to have a national perspective on principal appointments in New
Zealand primary schools. The four chosen groups were the Ministry of
Education, the Education Review Office, the Women's Caucus of the
Primary Teachers' Union (NZEI) and the New Zealand School Trustee's
Association. These groups are considered to have the most important
influence on principal appointment in New Zealand and my aim was to try
to capture an overview of 'what the problem is represented to be' (Bacchi
1999), from each of them. As will be seen, the range of viewpoints and
discourses being drawn on is diverse, partly because of how the problem
is constituted.

Four ways of representing the problem of women and school leadership
emerged at the national level. The official Ministry of Education
perspective, as we have seen, ignored gender in their representation of
the problem. For them the question remained around the problem of the
principalship, and this was seen as one of principal performance. This was also seen as part of the problem according to ERO, who along with the Ministry, drew on managerialist discourses to explain the issue in their responses. ERO, however, also drew on market and gender discourses as it saw part of the problem involving too few market choices of competent principals being available to boards, partly because of the assumption that women were not putting themselves forward. The NZEI women’s caucus drew almost exclusively on gender discourses and saw the problem as a complex and multi-faceted range of structural and cultural gender barriers, from sexist attitudes to discriminatory appointment practices. The School Trustees Association drew on different gender discourses, claiming male teacher shortages and a hostile masculinist principal culture as the central problems.

1. The Official Ministry Representation – Managerialist Discourse

The official representation of the problem was derived from a discussion about policy solutions in an interview with two Ministry human resource managers. Two Ministry policy initiatives had been proposed that were designed to improve principal performance. The First Time Principal Training Programme, set up in 2002, was being trialled at the time of the interview. A proposal for Development Centers for more experienced principals was also being planned. My question at the beginning of this part of the interview, exposed what the Ministry saw as the solution to the problem:

Interviewer: And so the whole purpose of it, if you can go back to why you did it in the beginning, this induction and development work and so on, is …?
MOE: For greater efficiency and to improve principals’ performance.
Int: So you would be more concerned with the level of performance of existing principals? Is that right?
MOE: It was mixed. I did the work initially based on a range of kinds of drivers. The Minister asked us to do the work, partly from ERO reports, which showed the range. I think it was more the range in a sense of capabilities and that some people were struggling. And the inefficiency, that people would get to it eventually, but it might take a year for them to work it out when they could just be told this week (MOE H.R. Managers, Interview 1, p. 16).

The managerialist discourse that surfaces in this dialogue, includes language of efficiency, performance, capability, the inefficiencies of time delays, and incompetency (struggling principals). The problem was located within individual principals, in particular those who are poorly prepared and under-performing. Because of this boards have difficulties attracting and retaining principals, but this will be solved by helping those principals, once they have been appointed, to more effectively and efficiently perform and cope with the demands of the job.

This was driven by Ministerial concerns about the high number of 'failing' schools, the high turnover of principals in some schools, and the stress and workload issues identified by principals, identified and reported in ERO reports (1996c; 1997; 1998b; 1999b; 2001b). The solution to these problems was training. There was, however, no acknowledgement of pre-principal preparation to ensure a cohort of suitable applicants to the principalship, but rather an assumption that existing principals were capable of increasing their competencies through the training initiatives. None of these initiatives were mandatory so there was also an assumption that principals would know what was good for them, and volunteer to attend.
The 'Unofficial' Ministry Policy Silence

Bacchi (1999) maintains that inaction by government is as important as action. It is not always the refusal to act but in approaching a problem as if action is unwarranted that creates policy silences. Identifying and discussing such silences is an important part of a political process to challenge dominant perspectives. In the interview the Ministry personnel denied that there was a problem with regard to the lack of gender diversity and with the masculinist representation of the principalship. They required empirical evidence. As there already existed Ministry data that showed the disproportion of men to women very clearly, other interpretations of the statistics were being mobilised. For instance, the two HRM managers spoke of the low number of women managers in education as not being unusual, but symptomatic of the wider labour force, and for gendered reasons such as broken service:

I think our perceptions would be that it's a similar reason of there being relatively small numbers of women in management roles in the wider labour market. I mean there are a number of factors in their employment history, that women are more likely to have had time off.

(MOE H.R. Manager, Interview 1, p. 1).

This explanation takes no account of the fact that the education sector, unlike many other places in the labour market, is highly dominated by women. It also does not account for the information gathered from the telephone interviews where the majority of the women told stories about being passed over for principal positions for younger less experienced males. Statistical data failed to provide a full explanation of the complexity of the issue.
The disproportion of men over women was represented as a question about applications and appointments, utilising a scientific discourse of numbers and percentages:

MOE: Whether women who apply are likely at a greater, same or lesser rate than men who apply for principals' jobs, to be appointed. I think that's really interesting to see whether there is an issue around women applying or an issue about boards appointing (Int. 1. p 1).
The ultimate question is, are they applying at the same rate (ibid. p 2).
I want to see the data of those applications and appointments (ibid. p. 3).

The assumption was that women were not applying, because without the statistics showing otherwise, there was no problem. Ironically, 'hard data', available prior to the 1989 reforms, was no longer centrally collected. The lack of systemic and systematic data rendered the problem as 'invisible'. Without the evidence there is no official reason to act, allowing silence to surround the issue. This culture of exclusion has been critiqued by Marshall (1997) and Tyack and Hansot (1982) as deliberate silence rather than just unintentional, and is seen as part of the cutting back on equity policies generally in New Zealand education by government (O'Neill 1994; Court 1994e).

Shifting Discourses

Both of the women interviewed had come to the Ministry of Education from the Human Resource Management field in the public sector and not from the education field, which might explain their responses reflecting managerialist discourses.
In the interview I recounted anecdotal information about discriminatory appointments I was aware of during the EEO contract. The Ministry elites discounted anecdotal information as invalid, indicating that generalisable statistics are the only rational scientific evidence worth taking note of, as opposed to people's stories about their experiences.

I was told:

I think that what we are saying to you is that stats are so important, because the picture in the education sector, the rhetoric and the anecdote lying on anecdote and unrepresented sample results. [Eyes raised to the ceiling - body language note in journal] (Int. 1. p. 8).

We were surprised because that was the anecdote, the rhetoric, and then we went out and did the study and it didn't match. I think that's one of the things in the education sector is that you get some sloppy thinking about 'somebody knows somebody who knows somebody', or there's one example and it gets to be generalised across the sector. Often there's one or two examples symptomatic of a larger issue of a school that was failing; that there was dysfunction or whatever (ibid. p. 10).

These responses are indicative of Foucault's (1980) analysis of scientific knowledge versus subjugated knowledge. In spite of the lack of statistical 'hard' data in the field, the anecdotal 'soft' data I had gathered over six years that emerged initially as isolated cases, had soon became a distinct pattern and more than 'hunches'. They did concede at one point that they would have a concern if 'the best person' was not being appointed, but it was couched in managerialist discourse as reasons of competency:
I think our interest, as the Ministry's interest, is in ensuring that we get the best possible principals appointed regardless of anything. Regardless of gender, race or whatever. That's our interest. So our interest or concern would be if there were women that were more competent than male applicants that weren't appointed. Then that would be an opportunity lost (ibid. p. 3, my emphasis).

The discourse of merit alluded to here contains an assumption that merit is neutral. Issues of equity are completely absent in this representation. Rather the Ministry's concern that this is an 'opportunity lost' is represented as one of inefficiency, drawing on discourses of Human Resource Management. This discourse continues as they persist in their denial of the gender diversity problem, and make excuses for boards:

I hope your study is able to achieve whether women are applying... then I guess if they are and they are not being appointed, then boards like other employers, do have difficulty identifying skills. Most employers have trouble identifying accurate predictors of future performance. It's just hard. So what the H.R. literature shows that people tend to do ...(ibid. p. 4).

Another traditional discourse about women derived from socio-psychological theories of the 1970s was drawn on in their conversation, when they spoke about women's lack of aspiration. This 'deficit women' discourse positions women as lacking ambition, confidence and leadership qualities:

From the work that we have done on women in senior management positions\(^{15}\), women focus on what they can't do, rather than what they can do. They don't necessarily sell themselves or are necessarily as
confident with themselves and project that as much as men do (ibid. p. 3).

This statement also reflects the hegemonic, commonsense discourse about retaining the patriarchal status quo, utilized in much of the 1950s and 60s education management literature (Ozga 1993) as well as HRM literature generally. From a feminist reading it is flawed by its essentialist and deterministic grounding, treating all women as a group who lack ambition and confidence and fear success. Paradoxically, this was a position the two women interviewed seemed to exclude themselves from.

Using this discourse the Ministry élites also positioned women in a deficit way in reference to their solution of First Time Principal Training. 'Women' are discursively constituted as 'deficient', requiring paternalistic intervention to reconstruct their identities in terms of confidence building, to enable them to do the principal's job:

I think there is one positive thing with the principals' training programme in that it may encourage more women to be more confident. That they can absolutely do this job of principalship...and they would have a mentor or somebody that they could contact and just encourage them so they could see that they would get through that (ibid. p. 6).

The focus, as with much EEO policy, was on improving individual women to meet criteria that went unchallenged.

2. The 'Unofficial' Education Review Office Representation – Managerial, Market and Gender Discourses

The second national body it was important to interrogate was the Education Review Office (ERO), as it is their role to monitor schools and
inform the Ministry of their findings, so that this evidence informs policy. ERO is adamant that it does not make policy, but in the perception of the New Zealand public, it has a more public and critical role than the Ministry because of the media releases published on ERO's reports of schools. The recently retired CEO of ERO, Judith Aitken, had also featured prominently in the media in her time there and was often direct and outspoken in her criticism of aspects of the education system. It was Aitken's term in ERO that covered the restructuring period, so it was her perception of 'the problem' that I was interested in, so I sought permission to interview her. However due to her retirement from ERO it is important to point out that this is not the official ERO position, but rather an 'unofficial' representation.

Like the Ministry interviewees, this female bureaucrat defined the problem of the lack of gender diversity in the principalship mainly in managerialist terms of principal performance, but with qualification. She argued that boards are limited in their choice of a quality principal because too few are up to standard, and that women do not feature highly in these numbers because of their resistance in putting themselves forward. Women's lack of interest in promotion she defined as 'a particular culture of women teachers', drawing on traditional discourses of 'deficit women', mapped both in the literature and generated by the media. She did not hold boards of trustees responsible as perpetrators of the status quo, using a discourse of the market and community choice to substantiate this view. What she did hold responsible, was the poor quality of training of principals which in effect denied boards the choices they should have had in a free market.

**Traditional Gender Discourses**

In her explanation of 'the problem' Aitken referred to a 1978 New Zealand study conducted by the Department of Education that looked at factors
inhibiting the promotion of women, when she spoke about a 'particular culture of women teachers':

In addition to that however, what we were discovering in 1978 was that many women would not and did not seek to go further. So it wasn't just a question of sexism. We were really disappointed. We really wanted to come up with a covert and overt sexism, but we didn't. We came up with all those reasons, which may be covert sexism somewhere in the makeup of men and women, but none the less where women were wanting to take that job for the hours that it had, for the school vacation period that it offered and the ability for them to do the multi skilled things that they were good at, which is running their families, bringing up their own children and doing a professional job as well, and earning money. So there was sort of four parts to that. A great deal of that has not in my view changed. A great deal of that I think for women has not changed. So those powerful incentives for women to take up more senior positions, which I think in the late 70's we thought would begin to provide more and more opportunities which women would take up and would be demonstrated in the statistics, haven't occurred (Interview 12, Judith Aitken, p. 3).

In her 'particular culture of women teachers' Aitken draws on four traditional discourses about women. The first is the 'deficit women's' discourse which involves blaming the victim. She states 'many women would not and did not seek to go further', implying as Still (1995) suggests, lack of ambition, ability or experience, unwillingness to take risks, failure to plan careers and lowered aspirations. The second discourse draws on the liberal feminist analysis of discrimination based on biological essentialism
and gender when she says, 'which may be covert sexism somewhere in the makeup of men and women'. Shakeshaft (1989) noted that overt and covert sexism operated in discriminatory decision making in her studies. The third discourse Aitken alluded to was the 'cult of domesticity' where women's role in the family is their primary role (O'Neill 1992), when she stated, 'women were wanting to take that job for the hours that it had, for the school vacation period that it offered'. She then shifted back into a liberal feminist discourse about 'superwomen who can do anything' in her statement, 'the multi-skilled things they were good at, which is running their families, bringing up their children and doing a professional job as well, and earning money'.

These traditional liberal feminist discourses too easily fall into the trap of 'all women think and act like this', essentialising their experiences, desires and identities, and does not recognise the differences among women teachers on the basis of class, race and ethnicity, which did exist then, as it does now. It also renders invisible the different age and career stages of women in teaching which impacts on family responsibilities, professional growth and competence, and satisfaction in the job. Perhaps the most obvious limitation of this discourse is its location within a particular historic context, and the generalisation across two and a half decades of rapidly changing social and economic conditions since, which makes these observations unlikely to be as realistic for cohorts of women teachers today.

Aitken's argument continued to enhance her treatise of blame, calling on the 'deficit women' discourse, as she developed an explanation for the continued existence of the glass ceiling and women's recalcitrance to break through it:

More and more women are knocking at the glass ceiling of the senior teachers in schools. They're right knocking at that, but it's going to take time because they are not a rebellious lot. They are tractable; on the
whole they are tractable. They don't like open conflict. They are not going to aggressively pursue careers because they like to think of themselves as involved in a professional vocation still, to a large extent (ibid. p. 4).

But the challenge of attacking that glass ceiling and breaking through it is too high and also, so many of them are the daughters of my generation and me. They are not the win-at-all-costs, fight-at-all-costs feminists that we were. They've looked at the cost in our lives, they've looked at the cost for them and they've said to themselves, "I don't know that I'm going to go that way. Don't know that I'm going to go quite that way, I think time is going to take care of some of those problems that our mothers battled against". So I think in the primary services it's a very complicated situation. Very complicated (ibid. p 5).

Again the passively constructed 'woman' prevails in the discourse of the post feminist era in this representation, which is by implication, rather pessimistic of change.

**Market plus Gender Discourses**

Using market discourse combined with the essentialist gender discourse, Aitken progressed her argument. In her view, the principal employment market is regulated at the present time by a bottleneck of nearly ready to retire principals at the upper end and a glass ceiling operating at the lower end, preventing boards of trustees access to a wide range of potential principals, which should be at their disposal in a 'properly operating free market':

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Until that generation of 58 year old primary male European principals who had school certificate as their overwhelming qualification, and who – it was the case anyway a few years ago, that only 28 percent of male primary school principals had qualifications other than a tertiary qualification, other than that diploma of teaching. Until that generation is gone, that glass ceiling is just going to disappear then. I think women would then become more predominant in those positions as principals (ibid. pp. 4-5).

Aitken's argument here falls into the 'pipeline fallacy' (Allen and Castleman 2001) which assumes the reasons for women's disadvantaged position in employment and promotion is the effect of delayed processes of social and organisational change, rather than controlled by the complexities of male advantage, gender power and the gendered nature of organisations. Pipeline effects such as women having less experience because of breaks in careers for child-rearing, or fewer qualifications than men, are often cited as historical reasons why women are not on a par with men. The argument rests on the notion that there is an unavoidable time-lag between policy change and organisational change. Aitken believes that the pipeline is operating and will produce gender equality in due course. She believes as the pipeline argument assumes, that recruitment and promotion are rational and neutral organisational practices. However, the pipeline metaphor is used to vividly demonstrate that it does not act in a neutral way: 'It contains valves and holding bays, deviations and constrictions and it leaks women' (2001, p. 156). The authors claim the pipeline is shaped to suit typical masculine career patterns, and the literature supports this by documenting the gendered nature of organisational culture that supports the male career (Kanter 1977; Cockburn 1991; Mills 1992). The metaphor also demonstrates how a simplistic view is taken of the human capital approach to labour markets and does not acknowledge the gender bias in definitions of merit in EEO policy discourse (Burton 1988).
Boards and the Market

Boards of trustees' appointment practices on the other hand, surprised Aitken in her time in office, as boards didn't act as she had thought they would. In this discussion she draws on both the discourse of the community and the market:

I didn't discover in my time at the Education Review Office, any of the evidence which I was told we would find after the first two or three years, which was that boards would go hell for leather for men regardless of all the other evidence. That they would simply not trust women. That they would say, "Our community wants a man who can discipline the children, who can control the staff". I didn't really find that amongst boards of trustees... I thought boards of trustees became better and better at looking at the range of skills that enabled a school to balance the community expectations, the professional needs and the children's rights. I thought communities of interest as expressed through boards of trustees got better and better at that. They still didn't have a very broad range from which to select (Int. 12, Aitken, p. 4).

I don't think the big inhibitors are boards of trustees' prejudice against women (ibid. p. 5).

This observation is in direct contrast to many of the findings in my thesis, so it is interesting to see what she believes the problem to be. Again she draws on discourses of the market, juxtaposing it against the discourse of professionalism as she defines the causes of the problem as a lack of talent in the market:
I think it's boards of trustees' difficulty in finding a wide enough range of talent. Enough people who are willing to take on what has become regarded as the unattractive job of the principal right across the profession as a whole. And boards of trustee's awareness that the role of the principal is a critical role. They know what they are looking for and I think the market has been too small for them and I've put that down to the very slow evolution of the Teacher's Council and the very slow evolution of teaching as a full profession, with really high quality pre-employment training and really high quality in-service training. It's still not there. The poverty of the training market has kept women as successfully out of a much fairer representation of the senior levels of primary schools — at the top levels of primary schools than should be the case (ibid. p. 5).

The case Aitken presents, drawing on market discourse, is that 'the market has been too small' for boards to employ 'talent', and 'the poverty of the training market' has caused women to be unrepresented at senior levels in schools. She also concludes, using professional discourse, that the cause of this situation is 'the very slow evolution of the Teacher's Council and the very slow evolution of teaching as a full profession'. There are a number of contradictions and assumptions in this argument. The most obvious contradiction is that the pre-employment and in-service training seems to have had a more deleterious effect on women than men, in that they have fared badly in the principalship stakes. The question begging here is why has the poverty of the training market not affected men in the same way as it has affected women? There is also an assumption that the reason there are not enough potential applicants to the principalship, is because the 'profession as a whole' (both genders) see it as 'unattractive'. Ironically, Aitken cannot possibly know this because of the lack of research and statistical evidence in this field, unless she is drawing on
anecdotal evidence and using different arguments from her Ministry colleagues to support her claims, especially in terms of women's applications. None-the-less, her argument doesn't account for the large numbers of males who are being employed as principals, who presumably must be attracted enough to apply.

**Managerialist Discourse of Principal Performance**

But are boards finding the market small because of the low number of males in the profession, and those with 'talent' rather scarce? In the following quotes Aitken begins to deconstruct the concept of 'talent', drawing on and linking professional discourse to managerialist discourse in her discussion of principal performance:

> The large numbers of older primary school teachers and primary school principals who have never had to demonstrate any levels of scholarship beyond school certificate or senior school attendance is a real, real concern. It also means that it makes them technologically averse, because literacy is an important attribute for competence with a computer. So I think one of the reasons that many senior, older men have been averse to picking up the adaptation that electronic technology can bring, is because they are actually language averse (ibid. p. 11).

When was adult literacy ever tested amongst schoolteachers and school principals? It was tested only with great difficulty in terms of the — they never have to write any narratives. They don't have to write any narratives. They don't write school reports except, "I agree basically with what the teachers in the school say". They have material which has been simplified so
that you can have multi purpose tick and cross answers. They have board secretaries who can do a lot of the work. Very very often, certainly my view would be that they were under educated to start with, under skilled to be going on with, under qualified in terms of the expectations when they first entered teaching and it had never really been picked up...I mean if you just had to look at the level of non-compliance with the law. I mean when we first started in 1991-92 the levels of non-compliance were 92 or some such percent. Enormously high. This was because they didn't know the law mattered. They didn't read the law. They didn't have to read the law. They didn't have to say whether they were compliant with the law or not (ibid. p. 10).

Professional discourses around literacy are used to portray the ‘language averse’, ‘technologically averse’, older male primary principals described in this dialogue, who ‘never had to write any narratives’, who are ‘under-educated’, ‘under-skilled’ and ‘under-qualified’, and who are ‘non-compliant with the law’.

In this definition of lack of talent, Aitken shifts into a discourse of managerialism as she associates principal performance, or non-performance as she described it here, with incompetency in literacy, and legal non-compliance. She also falls into ageist and essentialist gender discourses again, with her description of the culture of ‘senior older men’ and ‘older primary principals’ (who are mainly males).

Aitken foregrounds matters of quality performance, relegating gender to a subsidiary role, although she mobilised highly gendered discourses around older male principals and aspirant women. In the following discussion she continued to draw on both managerial and professional discourses in her definition of quality performance:
The job of being a principal has had a very bad press. A very bad press. People increasingly, rightly or wrongly, particularly those who haven't been given management training see it as you have to choose between being a good manager and a good professional leader. If you decide to take on board the management responsibilities, you'll be overwhelmed and engulfed by the compliance requirements. The very best of women principals recognise and understand that dilemma and manage beautifully. It doesn't matter whether they are public or private. The principals of Gisborne Girl's High School, Epsom Girl's Grammar and St Cuthbert's College are brilliant professional managers of professional staff and that's a really rare skill (ibid. p. 5).

In this description of the tension between professionalism and managerialism, Aitken has identified (perhaps without realising it) the central tension in Picot's (1988) original recommendations of Tomorrow's Schools. As I argue in Chapter Three, the document is contradictory about the role of the principal and the role of the board in management matters. It has been a confusing period for principals as they have grappled with both responsibilities and it is hardly surprising that the principalship has gained a bad press during this time. However Aitken's view on the principal's role seems quite clear by this account, which is that the principal must be both a 'good manager and a good professional leader'. Her position here draws on managerialist discourse and the emergence of the multiskilled manager (Blackmore 1993a) which reflected a shift from the 1970s onwards in organisational theory, towards new forms of organisational behaviour such as teamwork, and interactive skills. Choosing to be just one and not the other as well, leads to failure by her account. While the solution appears to rest in management training for professional leaders, her next comment puts doubt as to the capability of men to perform both roles:
Gender is not a predictor of leadership ability. In other words, if you are a man, this is no indicator that you'll be anywhere a capable leader. The difference I think, the significant difference there is that men – and it's actually true in all sorts of areas, on the whole many men are not multi skilled. It is one of women's socially conditioned attributes. They are multi skilled. Men decide and they behave accordingly that they will be a capable manager or a professional leader. And where their schools fail is because they actually don't bring the two together and they don't actually do either. The belief that somehow it doesn't matter whether you have your school competently managed, it will still run well professionally, is a myth. All the ERO reports prove that over and over again. A poorly run school, a poorly managed school will generally undersell its students in terms of the quality of curriculum delivery to them. It's a fact. It's a well-evidenced fact. It's not an option. So the male principal who selected one or the other was a failure, but there aren't enough women yet to demonstrate the truth of either, and sadly some of the evidence about women in some senior professional positions would suggests that they may follow the same sort of path as men, and they choose one or the other. But at the moment on the relatively small sample we've got, I think that the capable women manage both of those roles and they are multi skilled. It's life that's given them those, unfortunately it's not training. It's like it's opportunistic, it's an accident, which it shouldn't be, it shouldn't be (ibid. p. 6).

Aitken draws on contradictory discourses to argue her position and definition of the 'problem'. Firstly, she maintains 'gender is not a predictor
of leadership ability', but then mobilises gendered discourses about the lack of capacity of existing principals (largely male) to deal with change. Men, she maintains, are not socially conditioned to be multi-skilled, while women are. At the same time, she warns that there are not enough women in leadership positions to tell whether they 'may follow the same sort of path as men', and choose either to be a professional leader or a manager. The essentialism in these statements reflect the traditional gender discourses mentioned earlier, and undermine Aitken's previous argument about training improving principal performance and competency. Her argument is biologically reductionist in terms of relegating particular attributes to men and women, for example, multi-skilling. However she does see these gender differences as socially constructed due to the different social roles, that 'life has given them'. The logical consequences of her argument suggest men will never make competent principals because they lack multi-tasking capacities, whereas women have been socialised (not trained) to multi-task. A pessimistic notion of change indeed!

How big was the problem?

One of the issues that concerned me in this research was the extent of the problem of mismanaged appointments or appointments that turned out to be inappropriate. Aitken was quite forthright in admitting that the self-management experiment has had some casualties in the area of appointments of principals. The volunteer nature of the trustee, the reliance on the skill level of the community, the lack of training available, the lack of support and 'hands off' philosophy from the centre, all combined to produce some of the catastrophic consequences in the early days of the reforms that she refers to here:

It wasn't until 1996 after endless pressure, endless pressure, largely because of the process of appointing principals, that when Howard Fancy came as
Secretary of Education, he finally implemented what had been in the law since 1989, which was assistance may be given to boards of trustees to ensure that they can deliver their governance responsibilities. They can be trained, they can be actively supported, they can be – I mean it just, it was those dreadful seven years, seven years of letting them learn to run a five billion dollar industry. It was shocking and it was set up, in my view, to fail, in that sense. It was just hands off, it’s not our problem, not our fault; we can’t do anything for them. So all these ERO stories that came back. All these really worrying stories of boards that weren’t coping, like the whole of the East Coast. All that terrible time. All of those schools in South Auckland. And it is true that the children were the main casualties, but it was also true that those adults were just ghettoized in their own ignorance of what was expected of them. It was appalling.

Aitken’s criticism of the structures and philosophy of self-management seem ironic in hindsight, as her appointment to ERO was seen as one very much in keeping with the New Public Management ideals (Smith 2004). Her main task was to ensure schools were held accountable under self-management, and in this she was sometimes highly critical of schools, principals, teachers and boards in the media. However, she appears in this interview to lay a good deal of the criticism with the ‘hands-off’ approach adopted by the Ministry of Education during this early period:

But those boards of trustees were really treated very very shabbily so it was no wonder that they didn’t pick up the challenge, that they didn’t know how to engage in and attract and recruit strong women principals. They didn’t know how to deal with and improve the performance of their under performing male principals.
It was seven years of waste. It was just seven years of waste, so in lots of ways the process didn’t sort of start until the mid nineties and hence we’re beginning to get the merits of that now to some extent. But it was those gaps in political will, in official activities, in a willingness to hear what the evidence was telling you, in a desire to take your hands off (ibid. p. 8).

Aitken’s view of self management appears to be more interventionist than was the original intention:

And it was not good enough to say that the philosophy of let the managers manage was ever conceived to be a philosophy that would extend to locally elected boards of trustees. Now I think the first seven years in my view were extensively wasted (ibid. p. 9). Something like eight percent of boards of trustees was estimated to be functionally illiterate...With ERO reports we had to adapt the ways we talked to people...because they wouldn’t understand (ibid. p. 11).

When questioned as to the proportion of boards that failed in their governance functions in her time in ERO and how it had impacted on children’s learning, Aitken was quite frank:

Int: What proportion would you put in to the catastrophic category?

Aitken: Well I think we would certainly put it in the catastrophic where the child’s educational interests were seriously at risk because of chronic failure by the school. Somewhere between twelve and twenty five percent. Certainly no less than twelve percent ever in
any one year. There was never any less than that (ibid. p. 18).

Seven years of failure for students from 12 to 25 percent of schools has been a costly price of the self-managing school experiment in New Zealand. The quality of the leadership of those schools must be questioned in these statistics, and even though the study has never been done, it would be interesting to know how many of those principals were young, inexperienced, and male.

3. The NZEI Women’s Caucus Representation of the Problem: Gender Discourses

The third group interviewed was the Women’s Caucus from NZEI, which has a representative function advising the national primary teachers’ union on matters concerning women. For them the problem of the disproportion at the principal level was multi-faceted, complex and sometimes contradictory. They spoke of a number of structural and cultural barriers which contributed to the problem, most of which drew on gender discourses arising out of feminist research and EEO policy cited earlier.

Discriminatory Board Selection Practices

The Women’s Caucus represented women teachers and principals throughout the country and for them the biggest problem was represented to be boards’ sexist selection practices. Where this was most noticeable was where these practices were aided and abetted by sexist male principal advisors to the board. There are certain regions in the country where male principals dominate and where there is a noticeable influence of an old boy’s network of advisors operating. One of these regions was picked up in my focus-groups which I report on in the next chapter. The
Women's Caucus were well aware of these influences operating in effectively gate-keeping the principalship as a male preserve:

There has been in pockets of areas throughout the country — I don’t know whether ("Sonia") picked it up in her research, that there was a sort of a boy’s network that were used as the advisors for boards (Interview 3, NZEI, p. 2).

Male networks and their gate-keeping functions are widely reported in the literature. Both Shakeshaft (1999) and Grogan (1996) noted the gate-keeping role of male networks, in keeping the American superintendent’s position almost exclusively male. Shakeshaft (1999, p. 106) talked about the ‘white, middleclass, Protestant males’ who are hired by men ‘most like themselves’. Still (1995) critiques the notion of ‘the old boy’s network’ as not just operating as a glass ceiling, but as bias that happens all the time.

The Women’s Caucus also discussed particular ethnic groups which were noted for their patriarchal origins and openly sexist practices on board selection panels, such as Muslim and Polynesian cultures. They reported that sexism and a preference for male principals was overt where Pacific Islanders were involved on boards:

There was some anecdotal comment a few years ago that boards of trustees who were predominantly of Pacific Island culture were reluctant to appoint women, and preferred to appoint men because of their perceptions of the leadership roles and so on from their background... The anecdotal evidence came from women who were in middle management and who currently still are, and they raised that as barriers to getting into principal positions. Well all those women who have applied for many, many jobs are still in
middle management and still find that as a barrier (ibid. p. 1).

Court (1992) discusses how women are disadvantaged when being considered for leadership positions in ways that are culturally and socially determined, especially in terms of the hegemonic view where men are seen to more naturally suit a leadership role. Coffin and Ekstrom (reported in Shakeshaft 1989) discuss the situation where women are not hired for reasons to do with custom and where men refuse to take directions from a woman. This would apply to these ethnic groups where their strong patriarchal beliefs dictate that women are not active in the public space, where women are forbidden a leadership role, where discipline is seen as a masculine prerogative, and where even boys from these cultures do not take directions from a woman. The women principals interviewed in my large schools focus-group also commented on this sexism.

The discourses being drawn on in these discussions reflect the traditional, common-sense discourse of 'women as victim' to the social, cultural and historical structural barriers, documented in the literature by Schmuck et al. (1981), Ozga (1993), Blackmore (1993a), Acker (1994), Hill and Ragland (1995) and Shakeshaft (1989), where discrimination can take many forms but results in women not being appointed for reasons of their sex, rather than their ability or competence.

The Women's Caucus also questioned the professional competency of boards of trustees in general to make educationally sound appointments. Several of the women were critical of some boards' appointment practices that appeared to disregard the professional criteria:

When you go for a principal's job, and then as always happens you find out who all the other people were and people will say, "I can't believe that person got the job over that one or that one or that one". It's an absolute mystery to those people in the profession.
who know all of those involved and it's a pretty small community... "How did this happen?" is often the question that the 'boys' and the 'girls' all ask. I guess it's a pretty good gauge that some pretty shonky appointments are being made if the profession itself is kind of going, "I can't believe that!" (ibid. p. 4).

This raised a central dilemma that emerged from the reforms and which continues to plague the profession. The concern of the profession is about the ability and power of a group of lay, volunteer, community people, sometimes with very little knowledge of education, making important decisions such as the appropriateness of a principal. Yet educational reform, and specifically Picot, was premised upon a partnership principle that imparted local community with power. This study indicates it was a dilemma for both principals and boards, but that it surfaced when women principal applicants reported being passed over for principal positions by less experienced younger males. The profession indicated concerns about such appointments (see Appendix Seven).

Another aspect of this dilemma was when boards ignore advisors' advice, even when they seek it, as reported in the following quote from the caucus:

The boards don't take their advice if they don't necessarily agree with what's been recommended. So the advisor can go in and say, "for curriculum or professional leadership, this is the person who best meets your needs" and the board will appoint somebody else. So it's all basically saying that they are not using external advice or assistance. Often they are, and they still don't appoint the person that comes out as being the most appropriate appointment (ibid. p. 3).
This suggests the decision was premised upon criteria other than those stated, but on a particular 'local logic', or that the decision had been made prior to the selection process. The women from the caucus, aware of many such examples, saw the appointment process as a sham:

The last few principal appointments in our area, have been really pre-decided by the board. They were the incumbents, and the message gets out, "Oh don't bother applying because they've already decided. It's going to be the incumbent". Currently we've got a position going at (town name) at the moment, and the word has gone out that the board has pretty much decided it is going to be the incumbent, so don't bother. And there is apparently conflict within the board over that too. The staff is all in an uproar. It's really, really bad (ibid. p. 4).

Structurally, there was no appeal process for dissatisfied applicants. But many women on Caucus agreed that there was no point in an appeal process, because even if there was one, it would not resolve the situation for the complainant:

At the end of the day, if the board appoints a particular person to the job and then I come along and say, "I'm better qualified, more experienced, da da da, it should have been my job", who would want to work with me anyway? I guess there aren't many people who would want to do that unless you were going to get a bit of a monetary settlement for non-appointment or something. But you wouldn't go there and work would you, let's face it? (ibid. p. 4).
Female appointments were, in instances where male applicants were lacking, the default position. This was no less a sexist practice by boards, according to caucus members:

And I'm just thinking of - like in the (town name) area we've only got four women principals in the east side, but they were the women that were put in when the bloke wasn't that great. All four of them (ibid. p. 3).

This practice was also mentioned frequently in the focus group interviews in the study, and backed up in the literature. Women were perceived to be riskier appointments than men, a point supported by Appelt (1995), who found that chief executive officers who appointed women were seen to be taking a risk.

Women and Leadership Discourses

There was a discussion about the principalship and whether the position was an attractive one for women because of the bad press and the known workload issues. Juggling work and family responsibilities remains an issue for women in the women and leadership discourse because of the deterministic assumption that childcare and family responsibilities are in women's domain. Many women subscribe to the view that their family comes first and are put off by the bad press of the principalship:

I just hear so many women with families say that they are just not going to go any further because of the job size. Maybe it's because of the type of schools or areas that they finally do get principal jobs, either teaching principal or in an area where there's been a bad principal for so many years and they're in there as a change agent, I don't know. But so many people are just saying, "It's hard enough as an AP or DP, how
can I do it as a principal and manage my family as well?" That's a huge area (ibid. p. 5).

The discourses identified in this discussion draw on the structural barriers of the sexual division of labour, gendered nature of careers and juggling work and family. The double shift of work and housework Ozga (1993), and triple shift – plus childcare (Acker 1994), that many women negotiate, is well documented in the literature and resounds in this quote. This was also a significant issue with the women principals I interviewed in the two focus-groups. Even these successful principals talked about the huge balancing act that they dealt with on a daily basis, or the support they had at home from partners. Some had become principals so that they could have some control over their private lives, such as scheduling meetings when it suited them. Two recent studies in the Australian literature (d'Arbon 2004; Lacey 2004) also found the impact of the principal role on family and personal life was a strong disincentive to female teachers.

The majority of men are not required to juggle work and family to the same degree (Watkins and Blackmore 1993), which was backed up in my interviews in the male principal's focus-groups (see Chapter Six). These discourses also feed into the discourses of women's resistance to masculinised cultures, where the managerialist culture of the reforms have crept into school administration, and where the long hours involved in 'managing todays schools' are seen to be the norm, but 'too high a price to pay' for many women (Al-Khalifa 1989; Ouston 1993; Ozga 1993; Giles 1995; Limerick 1995b).

The other side to this debate, however, brought up by the caucus, was about rewriting the script and the need for women to be changing the bad press perception of the principalship:

Julie, [not her real name] I've heard you speak out very strongly about that issue, not at the last annual
meeting, but the annual meeting before, when our status of women's report came to the floor — everyone was saying, "Who'd want to be a principal? It's this, it's that and it's the other thing". You spoke very vigorously to our groups and said, "Hang on, I'm a principal, these are the really positive things about being a principal. This is the way you get the job. There's not enough good press around about principals, and it's putting women off." You were saying to them, "Don't be put off by that. The job doesn't have to be like that." I'm not saying that some of those workload issues aren't real, I know they are, but you did a bit of an impassioned speech to people about that. Do you remember that? But you did caution people not to believe everything's bad. It's almost like, that's a reason for women not to apply (ibid. p. 5).

The last caution highlights the way the principalship has been constructed by masculinist discourses as antithetical to women, with the express intention of discouraging women into the job. As the quote before demonstrates, this discourse is picked up by women themselves who re-articulate it to their own disadvantage, which just adds to the hegemonic intent of the original. It is extremely important for the future gender diversity of the principalship that there is recognition that it is the perception of what constitutes leadership and the principalship that is problematic here, not the women who subscribe to lead (Blackmore 1989). The discourses positioning leadership/principalship as masculinist need to be challenged, subverted and reinterpreted by women, and the script needs to be rewritten, as Gardiner et al. (2000) advocate. Their work endorses the work of Grogan (1996), Brunner (1999, 2000) and Smulyan (2000), who have found in the United States that women principals and superintendents are leading in significantly different ways to the established masculinist culture that is taken as the norm.
One of the ways of changing the script is by providing role models, a strategy well documented in the women and leadership literature (Shakeshaft 1989, Schmuck 1981). The women's caucus were aware that the situation seems to be changing slowly and there were good role models challenging the masculinist notion of leadership:

Well I think there are sufficient positive models around for women to want to apply for jobs now. I know in Wellington [city name] more women principals are being appointed. Like I think all our normal schools now are run by female principals instead of four years ago all of them having male principals. So the change is happening, but there are a great proportion of women who don't want to apply for whatever reason. That's sad (ibid. p. 6).

But restructuring had also produced work intensification, another factor working against women applicants. Caucus also indicated that there were different modes of preparation for the leadership role:

I suppose I'm generalising, but women appear to equip themselves to do the job by studying, by getting experience and so forth and go through a sort of a degree of learning and practice. Whereas men in general tend to get the job and then concern themselves about whether they actually need to find out how to do the job. So I think you might find that there's a bit of difference there (ibid. p. 8).

Women have always invested in their own professional development, probably in response to the EEO and other policy foci on improving women's skills in order to become principals and acquire the 'masculine attributes' (Ouston 1993; Hill and Raglan 1995). This was confirmed by the
focus groups, who also observed the high level of preparation women principals undertook before applying for their first job, and how this differed markedly with most male principals.

'Masculinity in Crisis' Discourse

The final issue to be raised in the Women's Caucus was the crisis and moral panic about the 'poor boys' in a 'feminised' world:

The moral crisis about boys, and all of the 'who-ha' that's erupted around this child who wrote the story about a 'boner' in Cambridge. Well there was a letter to the editor in 'The Herald'... some man wrote to the paper and said, "This poor boy. No wonder the world's in the state it's in when you've got women principals who are prudes and teachers who are prudes taking these complaints about talking about natural functions like erections and..." You know, the whole kind of issue had come down to the fact that the school was run by women and the world is being run by women and that's why we're in the state that we are in (ibid. p. 6).

This example is illustrative of the pervasive populist discourses of the 'crisis in masculinity' and the 'feminisation of teaching'. This example indicates the existence of the deep-seated fear of the feminine that underlies some of this discourse. It is indicative of a backlash against feminism, referred to by Lingard and Douglas (1999) as 'recuperative masculinity politics' which 'construes men as the "victims of feminism" and which wants to return to a societal arrangement perceived to have existed prior to feminist politics' (Lingard 2003, p. 33).
The Women's Caucus drew on a range of gender discourses in their discussion of 'the problem'. These closely reflected the official discourse reported in their publication, *The NZEI Status of Women Report* (2000, p. 9): 

[5.6] Although women make up a significant proportion of the teaching workforce, they remain under-represented in principal positions in the primary sector. There could be a range of reasons for this situation, including that women:

- Are not applying for positions – for example, for family reasons;
- Women are 'cancelling themselves out before they have run the race';
- EEO policies and practices at the local level are inadequate;
- Bias in local recruitment and appointment procedures.

4. The New Zealand School Trustees' Association (NZSTA) 
Representation of the Problem

The fourth national organisation studied was the New Zealand School Trustees Association. This national body has an overview of the employment situation and a responsibility to support its members in their employment role of principals. The manager from Head Office, with employment responsibilities, was interviewed. Gender was an element of how he viewed the problem of the principalship, but he did not connect this to the actions of boards of trustees. The problem for him lay within the existing principalship and for a number of reasons. Drawing on discourses of masculinist culture, he positioned the principalship as alien to women historically, and at the present time. He also referred to male principal advisors perpetuating the dominant male culture in their advice to boards.
He described a competitive and uncooperative male culture within principal associations and the teaching union, that was politically pitted against the employer organisations including the School Trustees' Association (STA).

The Masculinist Principal Culture Problem

The assumption underlying the discourse that positions the principalship as masculinist is that women choose not to enter it or they experience hostility in this alien environment (Itzin and Newman 1995; Parkin and Maddock 1993; Blackmore 1993b). This was how the STA 'élite' understood the problem of the lack of women in the principalship. Women were choosing not to enter this field rather than not being appointed. He said 'its always been difficult' (Int. 40, p. 1), indicating historical precedence, and appeared resigned to the present situation, with his rhetorical question: 'what do you do about changing that?' (ibid. p. 1). He continued to describe the masculinist culture of the principalship:

It's a very demanding job. It's a question about whether or not it's a dominant part of the career. And I suppose males have had that traditional role model of the male principal, which may have had some impact in terms of what people are prepared to expect... I would suspect there is a little bit of that in terms of - if you've already got a large domain of males, for a woman to gain access to that, is an extra demand. Particularly when you look at collegial support and all the other things that go with it (ibid. p. 2).

There is an implication here that women are not up to the job because of its 'demanding' nature, but it is difficult to tell whether this is his personal opinion or whether he is putting this reason forward for boards' resistance to appoint them. The problem is defined, however, as women not choosing
this career, so again the 'deficit woman' discourse resurfaces, as does the myth of women not applying.

Part of the masculinist culture discourse is the way the culture is perpetuated and reinvented as outside influences impact on it. Gatekeeping through the 'old-boy's network' (Hill and Raglan 1995) is one such strategy. In a discussion about principal advisors to the board, it became clear that STA have concerns that it is networks of senior male principal advisors who are partly responsible for perpetuating the status quo by influencing unsuspecting boards, and cloning themselves in their recommendations of who the new principal should be:

Well we know there's a bit of mates' jobs. I mean that's another of our concerns of principals helping principals...we actually do want to break that cycle. Because what it means is they just keep reinventing themselves...the principal's (job) is a vital one and if they're just cloning themselves then we're not gaining anything, particularly with the mates sort of thing (ibid. p. 18).

There was a similar concern about cloning in the next discussion about whether principal advisors to the board should be credentialled, and, more importantly, by whom:

Our worry is, if it [the training] is driven by the principals' organisations then it's very much still the old brigade. For instance at the moment people self nominate to go on the various training programmes (to become principal advisors), and some of them we wouldn't have anything to do with. We know some of those who go on the course and get accredited are people we have addressed on competency matters! So we have real issues about that. So it's a matter of
who actually says they're O.K. What sort of training are they being provided? And also what is the ongoing monitoring on that? (ibid. p. 16).

The situation described here of principals dismissed from schools on incompetency grounds and then going into advisory training, would not have been possible prior to the reforms. Centralised monitoring kept track of dismissed principals who would not be re-employed. The unregulated system of decentralised management put the onus on boards to check past records. The last two quotes hint at the political lack of trust (Codd 1998) that exists between the teaching/principal fraternity (the profession) and the employer groups such as NZSTA. Both groups - NZSTA and the NZEI/Principal Associations - are dominated by male members, and the male cultures that operate within these organisations are plagued with ongoing power politics, friction and lack of cooperation.

The masculinised culture alluded to in the next quote draws on discourses of traditional management and leadership styles which have been critiqued in the literature by feminists over the years. A typically authoritarian, competitive style, concerned with beating down the opposition, is portrayed by Ozga (1993), while Blackmore (1989) observed an aggressive, forceful and independent management style. The management style and male culture of these male dominated groups is alluded to in the following discussion about the politics involved in the Ministry setting up a new professional Development Centre initiative for experienced principals. In the initial stages the Ministry consults with relevant stake-holders as to how the new initiative should develop. In this case it is clear that the profession is withholding information from boards and STA on this development:

I'll give you another classic example in terms of the principal's development which would lead to some sort of credentials in terms of development centres...The unions (NZEI) and the principals' groups
are refusing completely to provide access of any of that information to the boards. So they're actually their worst enemy... At the moment there is a very closed mind within the principals' groups (ibid. p. 10).

The key people in this venture in NZEI, NZSTA and principal groups are men, and it appears from this dialogue that the professional groups (NZEI and the principal groups) are involved in a power play in gate-keeping vital information from NZSTA.

The discourse of masculinist culture pervades the STA representation of the problem, and there were several examples also in the focus-group interviews to endorse this. In the NZSTA elite's view however, there was an implicit assumption that boards were not to blame, and that the problem of the lack of gender diversity of the principalship had very little to do with their appointment procedures, but a great deal more to do with the advice boards were getting from the male network of principal advisors.

Boards are not the Problem

STA saw the lack of gender diversity in the entire teaching workforce, as opposed to the principalship itself, was posing a problem for boards:

I think that whilst the predominance is women within the teaching workforce in primary, it's actually the role modelling which is often sought after by boards and schools and communities... It really is a big issue and it's not even just at principal's level, it's at any level where the predominance is there. Less males are going now into the industry and that's becoming somewhat of a problem (Int. 40. pp. 1-2).
It's more often we get concerns about the fact they [boards] are not getting enough role models within the schools. That's coming through (ibid. p. 4).

The links to the 'feminised teaching' discourse as discussed and refuted by Smith (1999), is paramount and given legitimacy as contributing to the problem in this version, as are the implied discourses of the imperative of 'role models for boys', as Biddulph (1997) argues, and 'masculinity in crisis', as critiqued by Lingard and Douglas (1999). As Bacchi (1999) indicates, the solution implied suggests how the problem is represented and in this case the issue of women in the principalship is invisible. Instead the solution of more males in teaching defines the problem as too many women in teaching.

Boards are certainly not held responsible for discriminating against women in terms of their appointment practices, according to the STA position. The 2001 ERO report, critiqued earlier in this study, is mentioned as justification that boards are doing a good job:

STA: We've gone over the history. We've looked at the ERO report and that was fairly complimentary. It basically said that most seem to be doing a good job.
Int: Was this the 2001 report?
STA: Yes (ibid. p. 7).

This ERO report was flawed from the beginning by its' methodology, as I have mentioned earlier. It was a survey sent to boards asking them to self assess their appointment procedures, with no form of follow-up to ascertain whether boards were doing what they said they were doing, and with no in-depth qualitative data to analyse what criteria were used.

While STA seemed reasonably satisfied that there was no problem with the appointment process, they contradicted themselves later in the interview when they admitted doing very little in the way of preparing
boards for this important employment role and of wanting more money from Government to help boards become better trained:

Int: So has STA provided much training for appointment processes to boards in the past? STA: We were, in certain areas and on requests. Usually its at the beginning stage which is 'what do you need and what material do you require?' We can't take them through the whole process, we usually appoint them to somebody and say this is a good person in this area to help you through it'. (ibid. p. 16).

'We'd like to see greater support given to them in terms of when they run through the appointment process. We don't want to subvert their employment role but we think there can be better assistance given. We haven't found a way of actually providing the funding or whatever else to actually be able to do that... I must admit I have been mulling over putting a proposal up. The trouble is anything we do, we end up having to go to Government to get some funding and we don't quite like doing that' (ibid. pp. 12-13).

Training in appointment procedures comes under the EEO training umbrella which covers all personnel matters. Ministry funding for EEO did not include any specific training for appointments, so if it wasn't being provided for by STA, it wasn't happening anywhere. In the interview a concession was made that training would be a good idea, but the real problem in STA's view did not lie with boards but with the profession themselves.
Solutions to the STA Representation of the Problem

STA was able to discuss solutions to the two ways it had represented the problem. The solution to the problem of the existing principalship with its dominant male culture was to develop a cohort of credentialled principals from which boards must choose:

We quite like the idea that somebody would be credited to actually meet the standards of a principalship because it actually means we've got something that gives some level of comfort and they've gone through the basic training. Because what prepares them nowadays, except for DP/AP? So we'd far rather do it that way (Int. 40, p. 11).

The solution to the second problem of board training was to use a national system of recruitment agencies, which would eliminate problems of provider capture of which STA are suspicious:

There's nothing to stop us actually having an alignment with some of the recruitment agencies and saying to them, 'let's do a deal nationally. Boards would pay 'x' amount - you provide the following services'. And that actually gets through some of those issues. There you've got national support. We've got some comfort (that) there's actually none of the political and industrial elements coming into it (ibid. p. 17).

Summary of the National Representations of 'the Problem'

The analysis of the four national 'élite' interviews using Bacchi's (1999) approach of 'what the problem is represented to be' and her 2000 technique of identifying dominant discourses, revealed surprising
differences and similarities. Considering these four organisations are all highly involved in the field of employment of principals, it would seem a useful exercise that they share their information, and debate issues before policy is developed and implemented.

It was no surprise that the Ministry and ERO both drew on managerialist discourses to represent the problem as one of poor principal performance. There is a high degree of communication and policy development between these two organisations, so it is to be expected that they would be congruent in their analysis. Also both are government departments working within the same discursive policy environment, in which managerialist discourses have been dominant during restructuring. It is in their use or non-use of discourses of gender that the competing interpretations of the Ministry and ERO become most obvious. The Ministry's representation silences gender, while Aitken's highlights women as contributing to the problem, which draws on outdated liberal feminist discourses and blames the victim. Aitken's use of market discourses, also a dominant discourse in the reforms, enhances her argument by drawing attention to the complexity of the problem, but she uses it to further her claim that women, not boards, are responsible for the gender disproportion of the principalship.

NZEI and NZSTA on the other hand are not constrained by governmental policy to the same degree, but it was surprising to me that both drew on gender discourses so extensively, albeit in different ways, as the equity and social justice discourses have not been a dominant discourse during restructuring. On reflection however, their representations of the problem reflected the interests of their constituents, so that as advocates of women, NZEI Women's Caucus was well aware of the many barriers to women's progression to the principalship, and NZSTA mirrored many of the gendered arguments of boards of trustees.

Bacchi (1999) reminds us that any description of an issue or problem is an interpretation that 'holds' within it a potential intervention in the way of
policy recommendations. The exercise of interrogating these four élites at national level has resulted in discovering how they each interpret ‘the problem’ so very differently. As Bacchi says, interpretation ‘identifies what is of concern and what needs to change’ (1999, p 199), which indicates that there is no possibility for consensus about solutions to the problem of the gender representation of the principalship from the groups that are most likely to have influence in policy recommendations, because they are not even aware of their competing representations of the issue.

Moving On

The discourses drawn on in the national representations of the problem are the same as those produced by policies of the self-management reforms, except for gender. The philosophic viewpoints of a democratic partnership concept of control and a managerialist/market ideology, carried out within the devolved climate of boards’ autonomy are mirrored in the reform policies, and overlaid by the discursive effects of gender. However, the gender discourses in circulation and drawn upon by the four national bodies differ from the EEO/equity discourses identified in the reform texts, producing gaps, silences and contradictions from the original intent of EEO and equity policies. The discursive tension for boards is evident in the confusion there has been of both boards’ and principals’ roles ever since. This tension underpins the practices of how boards draw selectively, because of particular predispositions, from these discourses to justify their appointment decisions. The next two chapters explore the two discourses that emerged as the most dominant in the interviews from the focus-groups of board chairs, principals and principal advisors: those of gender and the market, which demonstrate boards’ justifications of the appointments they made. Chapter Six explores the discursive effects as boards draw on discourses of gender in their decisions about principal appointments.
CHAPTER SIX

DISCOURSES OF GENDER EQUITY

Introduction

In Chapter Five the focus of analysis was at the national policy level as discourses mobilised by the four groups with the most influence in national policy development were interrogated with regard to the definition of 'the problem'. The focus of the next two chapters is at the school and board level as particular readings of official policies are played out in principal appointments at the local level. An analysis of the focus-group interviews of board chairs, principals and advisors to the board was carried out across four regions of the country to ascertain patterns, themes and discourses. It emerged from this analysis that school boards re-interpreted the official policy discourses to produce situated discourses with their own local logics circulating in and around their local communities. In particular, they drew on gender equity discourses and market discourses. In turn, an analysis was undertaken of the discourses mobilised in three individual board case studies where appointments were made. These are discussed at the end of each chapter. In these local community contexts it was found that gender discourses were more extensively drawn upon by the board members on the appointment panels in all three cases, with some mobilisation of market discourses in one case.

Chapter Six analyses and discusses how gender discourses came to be mobilised at the school level, while Chapter Seven focuses on market discourses. There was a significant absence of boards calling upon managerialist discourses, despite its dominance officially at the national level. This is addressed in Chapter Seven.

The next section provides an overview of the appointment processes generally used by boards throughout the country, and a fuller explanation
of the concept of 'local logics' underpinning discourses mobilised in these contexts.

The Appointment Process: An overview

The first question in this research project was to investigate the actual selection procedures used by boards in appointing principals. The responses to the series of questions asked in each interview indicated quite similar results to the 2001 ERO survey\textsuperscript{17}, mentioned earlier. Most boards demonstrated that they were utilising principal advisors, most were advertising appropriately and out of the local area, most were sending out application packs, most were working to a set of criteria and person specifications, most were requesting referee's reports, most were short-listing and interviewing these applicants and most were using the same set of questions for each interview. While they reported on using these seemingly neutral procedures, there was no indication that they could be inflected by issues of gender. All the boards interviewed believed they were doing their best, putting substantial amounts of time and commitment into the process. Comments such as the following were typical:

F\textsuperscript{18} – The whole employment process in a school like ours – I mean that's a huge, huge ask of people (Board chair of a small school: Int.13, p. 29).

M – On the other side of this, as a chair, it's a hell of a lot of work to get a principal up there, because you've got the pressures of the community and their expectations that are almost stronger than the staff. It took hours and hours.

F – It is a huge commitment (Board chairs of large schools: Int.17, p. 38).

On the surface it appeared from what boards reported, that they were implementing most of the HRM procedures recommended as 'good
employment principles', again consistent with findings of the earlier ERO study. However, on closer analysis, using Bacchi’s (2000) notion of discourse which brings together populist, official and hegemonic discourses about gender, leadership and community, a more complex reading revealed quite different practices going on beneath the surface. My analysis revealed that while boards had put in place all the required procedures and appeared to be working within them, at the decision-making point in the process, which is usually connected with the interview stage, it was quite common for factors other than those specified in criteria or person specifications to take over. This has been observed by others in the literature as well (Morgan 1986; Notman 1997), and was confirmed by some of the principal advisors in the study:

F – The only other thing that I’ve got to add, is about how the boards make the final decision. Well the whole process of the job description, to the person specs, to the ad, to gathering the information and how you gather the different information from different sources to put a picture together of that person, and then making a decision based on all of those things that you’ve done. I think that you still get situations where people go through the process and are guided by the principal advisor, but still would like to make the decision based on gut feeling.

F – I’d endorse that too (Principal Advisors: Int. 2, p. 6).

F – I would say one of my concerns about the process would be the fact that the interview day tends to stand alone, despite all the work that’s gone before (Principal Advisor: Int. 40, p. 6).
The advisors here were discussing how most boards go through the formalised processes of selection in the initial stages quite well, from ‘the job description, to the person specs, to the ad...’, and then fall down by making a final decision based on something outside the agreed criteria and reverting instead to ‘gut feeling’. They believed that all went smoothly until the interview day, and it was during the interviews that other factors came into play. The discussions in the rest of the chapter illustrate how this process was occurring and how some of these other factors, particularly gender, came into play at the final decision-making phases of the process.

‘Local Logics’

An analysis of the discourses identified from the focus-group interviews revealed frequent mobilisation of market or gender discourses in rationalising boards' decision-making to appoint 'the best person for the job'. These official discourses then intersected with populist media discourses (see Thomson et al. 2003), and localised discourse that was driven by a particular ‘local logic’ (see the concept of list logics in Barth 1990). These logics, embedded in localised discursive practices, drew on particular understandings about the nature of the local community, the historical context and geographical location of the school, and as a consequence, who best ‘fitted’ their school. The concept of a ‘local logic’ covers numerous discourses that converged to a shared understanding about ‘community fit’, or what in the literature has been called ‘fitness for this school’ (Morgan 1986). One trustee alluded to this by saying:

F – But also what was actually extremely important was being able to fit in and be accepted by the community. Say sort of having values that worked in the community (Board chair of small school with woman principal: Int. 13, p. 24).
'Local logic' privileged the personal qualities that board members felt were important about their chosen candidate that suited their particular school or community, and ensured a 'comfortable' fit. These qualities were typically never articulated or discussed, and did not appear in the criteria or person specifications, but emerged as an underpinning logic of decision-making practice at the interview stage, often tipping the balance in the final decision-making stage. One advisor to the board described this process as 'loose as a goose':

F – It's as loose as a goose because some people use a ranking system and some people say "Oh it's a load of old cobblers. You've got to get who you want and we can work that out". But I've found it's been a really good thing to reflect on afterwards because I've always said the ranking system is going to guide you...it was actually proof that we had gone through a process (Principal Advisor: Int. 40, p. 3).

Job specifications, selection criteria and procedures become checklists or post hoc rationalisations, but it was the invisible – what is left unsaid – that determined what constitutes 'community fit'. These silences in 'local logics' could be discriminatory on the basis of gender, race, sexual orientation, age and family status; or they could be based on whimsical likes or dislikes. Some were based on personal qualities that impress selectors such as enthusiasm, personality, or the 'x' factor. The interviews in the rest of the chapter illustrate how these modes of discrimination came into play. None of these observations are new, and similar conclusions have been noted in the HRM literature including prejudice and bias, intuition, likes or dislikes, 'emotional feel' (Damasio 1994), homosocial comfort zones (Kanter 1977), and compatibility with the school culture (Broadley and Broadley 2002). They are human and subjective reactions, most of which will not even be consciously brought to the surface and discussed, but which have powerful implications and hold huge weighting.
There have been very few studies about selection of educational leaders (Fidler and Atton 2004), apart from Morgan et al.'s (1983) study of LEA headteacher selection in Britain. In this they questioned the usefulness of the interview, in that it does not provide 'evidence on the most pertinent competency category for future performance, and it is not even an efficient mechanism for testing knowledge' (1983, p. 2). However, they and others (Webster 1982; Bredeson 1983; Riches and Morgan 1989) have found the selection process was about the search for 'the right personality', and that the interview became the test of 'social acceptability'. Riches and Morgan (1989) referred to this phenomenon as 'the black box', and in their study the criteria that remained hidden in the 'black box' of the selector's minds included personality, appearance, voice, presence and the way questions were answered.

The notion of a 'black box' is a structuralist construct, implying that once it is found these factors become knowable. I prefer to think about this phenomenon as the 'gender/race politics of selection', suggesting something far more illusory, uncertain and unknowable, and which is highly unlikely to surface except in a disguised form. While it can include the personal qualities of personality, appearance and so on identified by Riches and Morgan (1989) and others, I also found evidence in my interviews of a much wider range of hidden factors, including discrimination around gender, age and family-status. Most boards, one would assume, would be wary of exposing discriminating practices, and it was with some surprise that I found so much evidence of overt examples of discrimination. While the majority of boards interviewed in the study seemed to be aware of EEO principles and implications and acted accordingly, I demonstrate in the remainder of this chapter how there were others where the prejudice remained the same while the disguise of it became more subtle and was less overt. The politics of selection in these circumstances, because of issues of confidentiality and lack of transparency or appeal, makes it extremely difficult to charge boards with discrimination. Compounding this problem is the legislative power boards hold, in regard to their unquestioned autonomy over appointments. The
unregulated context means they are a law unto themselves and can appoint whomever they like.

The Black Box of Selection

The official policy discourses of equal employment principles, Human Rights and gender equity were frequently referred to in interviews, but often blatantly disregarded or subverted in subsequent statements, actions or decision making. Comments such as ‘we appointed the best person to the job’ or ‘gender didn’t come into the decision’, signalled an awareness of the official discourse, but the following discussion of excerpts from the transcripts will also reveal considerable evidence of sexism, gender prejudice against women, homophobia, homosociability, and ageism. I will show how, as the school boards took up and interpreted the official discourse, they integrated it with the prevailing discourses mobilised by the media influencing their local communities, and either adapted, selected or rejected what best fitted their circumstances and ‘local logics’. The discursive effects were played out in a range of idiosyncratic board appointment practices, many of which centred around a decision based on gender.

In arriving at these decisions boards drew on a wide range of traditional and populist gender discourses including masculinist discourses of leadership in opposition to discourses of women and leadership. In the remainder of the chapter, I illustrate and discuss the findings of the focus-group interviews under these two broad discourses. Under the first there is evidence of discourses of ‘masculinity in crisis’ especially as this was played out in the need for male role-models for the underachieving and misbehaving boys. Under the women and leadership discourse the public and private dichotomy of women’s lives surfaces with discourses around marital and family status, careers, and the increasing effect of age. The multiplicity of gender discourses drawn on by boards in the interviews
added to the complexity of analysing the problem of the gender diversity representation of the principalship, as the rest of the chapter illustrates.

1. Masculinist Discourses of Leadership

The most prominent finding from this study was that boards demonstrated a preference to appoint principals who were male, unless there was some exceptional or historical reason for not doing so. There were instances in the findings where a series of incompetent or short-stay previous male principals were cited as reasons for the board to appoint a woman. Sometimes, but not always, they appointed a woman if the quality of male applicants was clearly in question, but in each case the appointment of a woman indicated the default position from the male norm. The most public example of male preference found in the study, was at the advertising stage where strongly gendered wording created bias in two advertisements featured in 2002 in the Education Gazette (an official Ministry publication used widely by boards to advertise all educational positions). Both featured on the same page, and were noticed as I searched through six months of Gazettes to compile a list of schools to send the survey to. One reads: ‘Have you got the balls to do this job?’ and goes on to develop the metaphor of a juggler, finishing with ‘Clowns need not apply’. The second advertises for a ‘Headmaster’ of a ‘co-educational boarding school’ (see Appendix Six).

Advertising for a male principal is illegal in New Zealand under the Human Rights legislation, but there were also many examples in the study of boards and communities who were quite forthright and overt about stating their preference for a male principal in the public arena:

F – I know that the community was surveyed in our school and there was a strong wish for a male. It was really interesting because I knew one of the staff members who’s currently teaching there and she said to me when I said I was going to apply, “Don’t get your
hopes up because I know this has come back from community consultation”
(Woman principal of small school: Int. 6, p. 10).

This woman went ahead and applied for the job and won it, but others have been put off applying in similar circumstances, such as another woman who was doing an exceptional job as acting principal at her school. She was keen to apply for the principal’s job until her male board chair arrived with a visitor and proceeded to show the visitor where the new principal’s office was, when ‘he gets here’. The acting principal said, ‘What was the point me applying? They’d already made up their minds’ (Woman acting principal: Int. 37, p. 7).

The woman chair of a conservative rural community spoke about the pressure her board were under to appoint a male principal:

F – It’s been the tradition at our school for quite a few years to have a male, and I had a regular fight on my hands with the community to break with that tradition. We also consulted with our community...a good sort of percentage who were very staunch about thinking that we needed to have a male principal. A female principal would never do (Board chair of small school with woman principal: Int. 13, p. 5).

Some boards are more covert about their desire for a male principal, but just as determined as the overt boards:

Int: Was it a clear winner, or was there a...
F - No, it wasn’t clear. There was another applicant, and it was a female, and she was also very close. We actually did look at it initially when we were short listing and asked ourselves whether we felt the community was ready to have a female principal and
we decided that they were if it came down to that, but in the end he won out over the other applicants...I think (place name) isn't an easy community to appoint to...it's a decile ten and there are very high expectations. So whomever we appointed had to stand out on their own and they had to be someone the community would respect.

Int: So what do you mean by the community was ready for a woman?

F - Well I think it's — hmmm — it's an old professional community, lots of money, very male dominated I think in business and community — things like that, and women are still seen, not so much as the homemakers — it's a hard one isn't it? A lot of women work...well a majority of them do, but I don't think the expectation is for them to lead.

M - But I think you may be looking at tradition and you probably are not game enough to try something new and untested in this community — because I don't think there has ever been a woman principal in a large school really in this region (Board chairs of large schools with male principals, my emphases: Int. 22, p. 3).

These boards are from a region in New Zealand where it is virtually impossible for women to get principal's jobs in large urban schools apart from girl's schools. Out of fifty town schools, only two have women principals. High decile 'popular' schools therefore were seen to require high-flying male leaders. An early reference to communities not ready for a woman yet was cited in Coffin and Ekstrom's study (reported in Shakeshaft 1989), but the sentiments of the above quotation also draw on the discourse of leadership as a masculine construct (Blackmore 1989; Collinson 1992; Hearn et al. 1995).
A principal advisor commented on the consequences of some appointments where gender over-ruled merit:

M - We spend thousands of dollars propping up males in leadership positions in primary schools; principals who should not have got the position in the first place in terms of their level of competency. They were not even competent classroom teachers because we've tracked some of them. They came into those positions in hurried appointments, very hurried appointments boards made, so we've got a male teacher in January. And in one particular case they've done it twice in two years, because the first one fell over, then they went out and appointed another one, and again appointed a male. If they had been looking at competency and a proven track record, I know for certain in one of those appointments they would have been told this person wasn't competent, but they ignore it. They wanted a male (Principal Advisor: Int. 38, p. 12).

This situation sounds extreme to someone from outside New Zealand, but since the unregulated environment was introduced in the reforms, boards have had the powers to persist appointing males and making these kinds of mistakes, which they appear to do with impunity. This is certainly an area for more research, but on anecdotal evidence, happens quite frequently.

**Discourses of Masculinist Hero Leadership**

The reason for the male preference referred to most often in the interviews revolved around discourses of principalship which embodied qualities of masculinist/hero leadership. Sinclair (1998, p. 177) in Australia, argues that the 'heroic ideal of leadership' has its origins in cultural myths of Australian male sexuality which 'has come to be identified with a tough
stoicism and a rejection of the sentimental and feminine'; an observation that could be equally applied to New Zealand as a similar frontier society. In the interviews the dialogue also reveals the masculinity in crisis discourse. This was most often articulated as needing a male to discipline the boys, a finding which is backed by other New Zealand research (Court 1989), but it was also linked to team sports and outdoor education. Hero leadership is also based on a historical notion of warriorship and leading by example where discipline is part of the militaristic discourse involving fear of authority. Maori warriorship epitomises this populist discourse in New Zealand history, both on the field of battle and on the sports field with the 'haka' war dance. Connell (2002, p. 141) discusses more modern forms of hypermasculine military gender regimes which emphasise 'competition, physical hardness, conformity and a sense of elite membership'. The Maori 'haka' certainly fits Connell's gender regime.

The ability to discipline was discursively constructed as a male attribute by school boards, and was frequently positioned as oppositional to women's leadership styles:

M – Gender didn't come into it. Well, O.K. the discipline thing, her size and that type of thing probably would have countered against her with dealing with some of the characters we've got. Some of the board did have "we want a man, no matter what" attitude, but the process we went through to appoint, we just had the person that we wanted (Board chair of small school with male principal: Int. 15, p. 3).

There was an assumption by boards that women are incapable of disciplining, in spite of the fact that in most New Zealand schools it is women who are responsible for discipline in schools. Responsibility for discipline is usually tagged to the Deputy Principal position, and women
comprise 80 percent of DP positions. In spite of this, the above response was typical.

The literature also raised discipline as a barrier to women's appointment chances. Morgan et al. (1983) found selectors consistently expressed doubts about whether women were tough enough to run schools, but as Hall (1996, p. 84) says, 'the doubts were not based on empirical evidence of women heads' inability to handle difficult situations'. The empirical evidence is also missing from the board chairs' dialogue in my study, but their position is more emphatic than Morgan's selectors appeared to have been, who only had doubts. In my research there appeared to be an assumption by boards, rather than doubts that women were incapable of disciplining. This is clarified in the following example where, in an extended discussion between three male board chairs (two of whom were Maori) and one female chair, there is an interesting deconstruction of the gender/discipline discourse. This discussion was initiated between themselves in the focus-group when one of the Maori men (M3) adopted the role of asking leading questions and challenging the others in a way, I, as interviewer, would never have presumed to do. In this case it brought some astonishingly frank responses and was helpful in getting below a surface-level analysis20.

M2 – Well put it this way, when we read the CV's and everything, the male was not even considered. It wasn't until we actually met the guy. For starters he hadn't been teaching for more than - he'd only had four years teaching experience, and he wants to move up the ladder. But a big thing was that he'd actually done a lot of work with young people coming out of prison on an Outward Bound21 type of course, so that meant that there was a big discipline thing there.
M3 – Suit some of your kids! (Laughter)
M2 – Yeah, some of them. Actually probably a big percentage of them. Honestly that's where some of
them were heading. There’s no doubt about it. At the age of ten you could pick them out and say you’ve got five kids that are well on the way to being criminals (Board chairs of small school with male principals: Int. 15, p. 9, my emphasis).

Here, the ‘local logic’ was dominated by notions of young disaffected males and the need for ‘strong discipline’ with the assumption that only a male could deliver. The agreed-upon criteria for the job was relegated to secondary status. This male candidate, it appears, would not even have made the short-list on the evidence of his C.V. ‘It wasn’t until we actually met the guy’, that everything changed and there was recognition of ‘the same’ and of a form of masculinity seen to be desirable.

M3 – As a board “Sam” [not real name], you must take into consideration your community saying “we want a man, we want a man, we want a man”, because I think you’ve told us that you’ve interpreted that as being “we need someone to control our kids”.

M2 – The discipline thing. Using the background.

M3 – Whether it’s a man or a female, the discipline thing is going to be a factor?

M2 – That’s what the board took out of it. We needed a discipline type of thing. The community had seen a relieving principal come in who was a male, who was ‘old school’. He’d been teaching for thirty-five odd years and he took no crap, simple as that that (ibid. p. 33).

M2 – Discipline things he was well ahead, because of his previous experience with the Outward Bound, with these little crims.

M3 – And he had size on his side.

M2 – And he was a male.

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F - And he spoke Te Reo?
M2 - And he spoke Te Reo.
M2 - ...What did he say to me the other day? He said, "You appointed me because I've got a penis and three kids". That was it (ibid. p. 36).

The embodiment of size, sexuality and maleness equates here with discipline in the board's mind. Additionally, given the cultural background of the students, this young male also spoke Te Reo, the Maori language.

Interviewer: - How did your first female principal deal with the discipline?
M1 - We had real problems with discipline. We really did.
M2 - Our issue is that they still get into trouble, they still break the rules, but when the rules are broken the consequences are consistent. That is probably - going back to this guy's CV and him having involvement in Outward Bound courses for delinquents, that was a big part of - he had strategies. The other applicant was going to remove kids from the classroom and it wasn't the answer that we wanted to hear type of thing.
M3** - So it may not actually be anything to do with the fact that he's a male. It may actually be his experience in the field? The point was that perhaps this guy - even if it was a women, the point is that the appointee has the skills, the experience in the field, in terms of the discipline that you guys were looking for. Whether it was a male or a female that person needed those skills and experience and is more able to enforce discipline as a result of having those skills and experience, but the question is, is there a fear factor by virtue of the fact that 1: he's a male and I guess 2:
he's bigger? He's a big male. If you had a big female, assertive, with those sorts of experiences is it possible that she could instil the same fear in the children or discipline rather?

M1 — Yep, it is possible. We had a previous principal that was a female who was six foot tall and was able to stand above the kids and say, “I'm not going to take any of your rubbish”

M3 — So in effect it's not even about male/ female?

M1 — It's not a male female thing.

M3 — It's about a role — the make-up of the role.

M1 — It's the make-up. It's about what tools that they come with to overcome those.

M3 — both learned and natural tools.

M1 — Kids will push the boundaries and you need somebody...(Board chairs of small schools with male principals: Int. 15, p. 39).

A number of associations between masculinity, leadership and social norms are evident here. Firstly, there is an implied assumption of ‘delinquent boys with criminal futures’ in this account, reminiscent of Skelton’s (1996) ‘tough machismo boys’ with their compensatory culture of aggression, who need a powerful masculine leader such as the ‘rugby league model’ Hester Eisenstein (1993, p. 5) speaks of with his ‘take-chargism’ leadership style. Secondly, this is positioned against popular discourses about women principals’ leadership and behaviour management styles, as caring but not authoritarian (Noddings 1984; Beck 1992). Removing children from the classroom ‘wasn’t the answer’ the board wanted to hear.

The binary implied in this argument is not entirely accepted at face value as oppositional by these board chairs, but is analysed further, especially when the board member (M3) shifted into the ‘interviewer/analysers’ role, from the point marked with a double asterisk ** in the interview (see the
above page). He makes an attempt to pull together their analysis and apply the argument to a female in that position. However, the group still concludes that the 'natural and learned tools' necessary for effective discipline and control, are manifested and embodied in male terms and attributes, such as superior size, sexual and procreational factors ('I've got a penis and three kids'), the adoption of military control strategies and the use of stand-over threat and fear tactics. The hero leader could at a stretch be a tall assertive woman, but never by implication a short one, and more than likely will be a man, short or tall. The use of the phrase 'natural and learned tools' links into discourses of gender, well documented in the feminist literature, where 'the natural' signifies biological determinism and an essentialist nature, and 'the learned' relates to socially constructed behaviours, values and expectations.

In another New Zealand study, Court (1994d) found similar dynamics occurring with her senior teachers who were job-sharing. Discipline, size and fear were associated with a male dynamic, which acted in counterpoint against a discipline, 'mother', care, female dynamic. In my entire study there was only one other reference to women's ability to discipline effectively, a tall woman who used stand-over tactics mentioned in the last quote. However, even in the second reference the discourse shifted to an educational construction of 'behaviour management', which has connotations of positive, constructive discipline. The reference mentioned that the woman applicant had run successful programmes in her previous school. This implied concession that she had 'the tools' to discipline, despite being female, but there was also an implication that the success of keeping discipline depended on following the procedures in a previously thought-out educational management programme, which was distinguished from inducing fear and implementing stand-over tactics.

Discussants in the study also drew upon another powerful discourse which impacted on the gendered nature of discipline – that of ethnicity, which was also mentioned by the principal advisors:
Men in some cultures do not regard women as equally suited to some roles...sometimes to do with discipline of students. There are some, certainly some of my Pacific Island trustees don't believe a woman can keep discipline for their Pacific Island boys. They are quite blunt and say, "we need a man to sort these boys out" (Principal Advisor: Int. 8, p. 2).

Pacific Island cultures regard the disciplining of children in different ways to Pakeha culture, favouring a more authoritarian and physical approach (Ngan-Woo 1985; Morton 1996). In Tonga disciplining children by physically hitting and beating them is not considered shameful, but instead is positively valued as a necessary, inevitable and important form of teaching and an expression of love, protection and concern (Morton 1996). Samoans, according to Ngan-Noo (1985), have considerable fondness and affection for their children, but are very strict with them, and, reinforced by Biblical teachings about not sparing the rod, physically punish them to ensure proper behaviour. Admonishing punishment in both cultures is linked with hierarchical relations, so that while mothers engage in the everyday management of behaviour of their children, serious misbehaviour is moved into the realm of fathers. Where discipline becomes an issue with the school, it is considered to be serious if the principal is involved, because, as Helu-Thaman (1994) points out, Pacific cultures value rank and authority and require conformity, restraint and humility to elders in such authority.

Contradicting the dominant view of the boards on discipline were comments from the women principals, none of whom considered they had a problem with discipline. Most of them had had years of experience being in charge of school-wide behaviour and discipline, as part of their job description as deputy principals. Understanding and recognition of this prior experience appeared to be invisible to most of the boards interviewed, and the following story highlights this point. In it, a woman
principal deals with a patronising father who assumes women are incapable of effective discipline:

F – There had been an argument and this boy had been chasing his younger brother with a four-by-two\textsuperscript{22}, and the teacher had sent him home at lunchtime. We asked the parent to come and get him. He was out of control, so he went home. Well next morning father arrived in his gumboots, into my classroom at 8.30 and he said, "I'm not happy about what happened yesterday". I said, "Well neither am I". That started it. Then he said, "Well what are we going to do about it?" This father said to me, "Well I'm on my winter hours now so I'll be around a bit more. Do you think it would help if I came and spent some time in the playground at lunch time and put a male presence in the playground?" Well the steam started and I said straight up, "If you think the reason why your child behaves the way he does is because we don't have a male in our playground, you need to go away and do some reading about it", and I walked off. I was fuming, absolutely fuming (Woman principal of small school: Int. 6, p. 37).

The implication made here by the father is that the boy was sent home because the women staff failed to control him. There is complete absence of understanding that the boy was sent home to calm down because his behaviour was dangerous and made the school-yard unsafe for other pupils. Instead the patronising claim is made that a male is needed to control and discipline the boys because the women on the staff lack male qualities, presence and embodiment. The 'male presence in the playground' links to the earlier quote about fear, body size and male authority, as well as to the gendered discourse of male role models for boys.
Within recent years there has been a focus on boys in the gender literature (Gill 2003) and particularly on the crisis of non-achieving boys. Role models for boys is contingent on the heroic masculine leadership discourse (English 1994), where the leader is seen as the lifeline to heroism to his followers, and in my study male role models were seen as the solution to the 'problem of the boys'. A large number of boards made mention of 'failing boys', 'naughty boys' or 'fatherless boys' as a reason to appoint a male principal:

M - I mean we know that we need males in schools to give role models and stuff like that for the boys... if you had a female and male with the same sort of skills and qualities, you would have chosen the male (Board chair of small school with male principal: Int. 15, p. 1).

The populist discourse of male role models appeared in the transcripts to have gained such widespread acceptance, it silenced and subverted the EEO discourse. In some instances discourses of the 'failing boys' were connected in classist ways to discourses of disadvantage:

M1 - It mightn't actually be the discipline thing. More the father figure. Like there's sort of split families and no Dad at home and the kids run riot over Mum sort of thing - single parent families.

M2 - We need some more positive male role models out there, is what it comes down to for me, for our boys in particular. Especially when Dad's on the dole, smoking dak (Board chairs of small schools with male principals: Int. 15, p. 37).

As Janet Smith (1999) suggests in her research on the subject of role models for boys, there is an ongoing silence about the responsibilities of
the fathers who have abandoned these boys, and instead blame for the single mothers and women teachers who are left to deal with the problem. In the way the problem is represented in both her research and my interviews, there was an implied solution to the problem of the 'poor boys', using Bacchi's (1999) approach, which was that male teacher role models would solve the problem:

F - The connection to the perceived lack of male role models was very much an issue in our community as to why they wanted a male principal. There has to be those male role models. Interestingly, none of the people that put the idea across were single-parent families. They were two-parent families making judgements about other families' needs (Board chair of small school with woman principal: Int.13, p. 2).

This woman board chair was more discerning than the usual about the classist judgements of some of her community, unlike the next male chair:

M - And for probably the lower socio-economic areas you've got to have strong role models I believe and it's that kind of character you've got to judge, to see that they will be strong role models for these types of people. Also what's happening in our school is the same - single parents, de facto parents, so there's a different type of community out there now (Board chair of large school with male principal: Int. 22, p. 4).

'The problem' then, as portrayed by the boards and using Bacchi's approach, was that the lack of significant male role models in boys' private lives caused misbehaviour, lack of esteem, failure at school, teen suicides, and so on. The distinction between schools providing father figures for fatherless boys rather than competent teachers for all children appeared not to have dawned on some boards. The moral panic that has arisen from
discourses of 'masculinities in crisis' (Mac an Ghaill 1994; Lingard and Douglas 1999; Connell 2002), mobilised and amplified by the media to become a problem of national public concern which boards have drawn on, has represented the male presence as such an endangered and scarce commodity that 'panic buying' has ensued. The discursive effect is that boards have come to believe that schools should provide these role models as a fundamental priority. Unfortunately, implicit in this solution is the conflation of teaching and parenting/fathering (Smith 1999), the silencing of the particular needs of the fatherless boys and the flawed assumption that any male teacher will do, without looking at the particular qualities the male applicant brings. A further argument that dispels the populist notion that male role models will solve the problem for the failing boys, but which appears to have escaped the public's notice, is that males have historically continued to dominate as role models in the principalship and yet boys have continued to 'fail'.

The Metamorphosis of Heroic Leader to Sports Hero

The militaristic image of the heroic leader accounts for the dominance of discipline in the hero leadership discourse. A twenty-first century reading of this aspect of leadership turns to the battle-ground of the sports field and marshals images of leader-turned-sports-hero. The modern-day Napoleons are the David Beckhams and Jonah Lomus24 of the sports fields, claiming world attention, drama, esteem and large followings. Connell (2000) describes the 'iron man' as exhibiting the exemplary masculinity of a sports star. The dominance of male sport gaining world attention is well researched in the literature (Sharp 2001), particularly team and extreme sports. It was not surprising then to find evidence in the transcripts of the privileging of team-sports and outdoor-education in gendered ways by boards.

In the board chair focus-groups some members talked about the importance of the principal having an interest and ability to encourage and coach team sports, by which they appeared to mean boys' sports, as girls'
sports were silenced with no references to them. Male team sport performance is privileged and linked to the gendered construct of discipline, presumably as an acceptable vent to excess energy and an outlet for channelling highly charged testosterone levels. Culturally the Australasian obsession with male team sports also provides a public stage for national heroes (Connell 2000) as well as a stage for legitimised aggression. There is on-going media coverage of ‘loutish’ behaviour associated with rugby, Aussie rules and rugby league reported continuously in newspapers and television coverage, which, while not purporting to condone this behaviour, allows it to become the norm by the repeated attention given to it. More often than not, I suspect national sporting heroes arise from the ‘failing boys’ camp in schools, as sports is seen to be important as one area where these boys can achieve success (Connell 1993). Unsurprisingly then, some boards rated male teachers and principals highly for their interest and aptitude in team sports:

M1 – O.K. we’d had female teachers and we identified that we were lacking in the sports side of things. The physical education type of thing. The kids were out on the tennis court doing exercises every morning. That was good, but they wanted to play the team sports thing and that wasn’t happening.
M3 – So the male...
M1 – Brought in the team sports. He brought in the discipline.
M3 – That was on the basis of his skills and his background, not on the basis of him being male?
M1 – No (Board chairs of small schools with male principals: Int. 15, p. 9).

In spite of the effort of M3 once again trying to distinguish between skills and masculinity, M1 conflates masculinity with sporting aptitude and
discipline. The three things in his mind are irreversibly intertwined, which makes it very unlikely that he will be able to separate these two learned behaviours (sporting skills and the ability to discipline) from gender. In addition he rates team sports as masculine and superior to physical education ‘exercises on the tennis court’, which is feminised in his construction. In the same discussion a female board chair appeared to subscribe to M1’s gendered constructs of team sports, but she shifted the discourse slightly by drawing on traditional discourses of women’s private lives as mothers, depicted in the literature as ‘the cult of domesticity’ (James and Saville-Smith 1989; O’Neill 1992). She discursively constructs that role as conflicting with the role of a woman principal in a small community:

F – See that was the same for us. I mean our ex-principal was good at the team sports. He spent every Saturday with teams of one sort or another at the various soccer tournaments etc. Coached every week and that was one of our criteria for the new principal. “Are you going to involve yourself in the community?” There’s another thing for a woman. I mean if they have already given up five days, I’m sure their children want to see them on a Saturday (Board chairs of small schools with male principals: Int. 15, pp. 9-10).

The resounding silence in this discussion is the role of men in their family and domestic private lives. Also of interest is the boards’ dominant interpretation of sporting activities constituting ‘involvement in the community’, with no mention of cultural or service activities.

Associated with these sporting activities are outdoor-education pursuits, which include some of the more extreme and male associated sporting experiences, such as white-water rafting, abseiling, and caving. The inclusion of such activities was seen by the boards as something males
do, and this is backed up in the literature as a male prerogative (see Sharp, 2001). One advisor spoke about the number of times in selection meetings he had listened to women board members reflecting on their own exciting outdoor-education experiences which had been led by male teachers at primary school, and who wanted their own children to experience similar activities. The opposite memories of a woman principal advisor as a child at a convent school, endorsed the male role in the world of outdoor education:

F - 'The nuns didn't do anything terribly adventurous, I mean when Sister Michael took off her stockings and shoes when we did the rocky-shore study, everyone nearly had a fit because we didn't really know if their feet would be white. We didn't really know because they always wore black stockings and I can remember just wanting to stare and stare at her feet. Isn't that hilarious? Her feet were so like porcelain (Principal Advisor: Int. 40, p. 1).

These examples from the interviews reveal how experiences of board members from past times inform current attitudes about male and female principals and their roles in relation to sports and outdoor education.

Lingard et al. (2003, p. 128) note that certain forms of leadership and certain types of leaders are legitimated in the educational leadership literature, and 'there is a tendency within these discourses to valorise the individual traits of leaders, especially those that are enduring and heroic and, most often masculinist in orientation'. As the interviews above demonstrate, this type of leadership was referred to frequently in the study as the preferred form of leadership. In the next section the discussion changes to reasons of gender balance which incorporate discourses of EEO principles.
Official EEO Discourses Subverted

As already stated school boards were not unaware of official EEO discourses, even if as a ‘popular’ reading. But in the absence of monitoring or legal consequences they were prepared to openly flout the law and discriminate against target groups. Another of the unintended consequences of this official discourse was to subvert it to their own ends. This occurred as boards interpreted the gender balance principle in ways which benefited their ‘local logics’, with opposite results to those intended by the Act. The Act promotes the movement of women into senior positions where there is a disproportion in terms of the gender balance in the workforce. Boards have misinterpreted the disproportion to mean an imbalance of males in the teaching workforce generally, and appointed them as principals to achieve more of a balance. The following comment epitomised board’s justification for employing male principals:

M1 – Because we were an eight teacher school, we had eight female teachers, so we decided that we wanted to push for a male teacher. At least get one male teacher. That was difficult.
M3 – It just so happened that the same position was a principal position?
M1 – At that time.
M3 – So you’ve done it on the basis of a sort of balance? Trying to improve the balance? (p. 1).

F – I’d be lying if I didn’t say we all prayed that the best applicant was going to be male because hey, we would have been an all female school otherwise (p. 6) (Board chairs of small schools with male principals: Int. 15).

As discussed in Chapter Five, the gender imbalance of the teaching workforce has become more pronounced as time goes on. Fewer men
enter teaching each year (Brooking et al. 2003; Gronn 2003) and this is seen as undesirable because it is widely believed that schools should be reflecting society. The following female principal did subscribe to EEO principles and was actively seeking more male teachers to be represented through all levels of her school.

F1 - Six men applied for this school, and I'm quite into positive discrimination at the moment. If I can get a good male - I've got good females. I've got one, but I would like to see one more male in the place if I could, as this role model for boys...

F2 - And it's lonely with one (Women principals of large schools: Int. 16, p. 34).

One could argue that there are two interpretations of gender balance in this dialogue that are contradictory. One is about a balance of numbers and the other is about ‘balance’ in terms of gender role-models. The one male teacher reflects the proportion of men in the service, which could be justified as a numerical balance, while the balance of male role-models to the boys at the school would clearly be unbalanced. My reading of the dialogue suggests the principal was aiming for more of a balance of male role-models, because she continued to describe how frustrated she became in her attempt to appoint men to her staff. None of them met her criteria for suitable or appropriate role models:

F1 - But six males – how they choose their referees, who knows? But six referee checks and I just became more and more despondent. "Well they kind of leave school at 3.05 p.m. — that one he won't do sport, just be aware of that" (these are the referees). "No great flair". The next one was, "very nice person, but terribly boring". These are our principals of the future (Woman principal of large school: Int. 16, p. 34).
The quality of the male applicants in this quotation raises concerns, not just about the number of males entering teaching, but also their suitability as role models for all children. This point is made by Janet Smith (1999), as she cautions about the need to match the particular needs of students to the qualities male teachers bring to teaching as role models for boys. The crisis about quality in turn feeds into the crisis concerning principal recruitment, if ‘these are our principals of the future’. The ranks of recruits indicate that the future looks bleak, if boards continue to choose men.

There were a number of other discursive effects that emerged from the official gender discourses competing with ‘local logics’, but the second most dominant one revolved around discourses of gender differentiation and was positioned against discourses of leadership as either suitable or unsuitable for women. My discussion now moves on to examine the discursive effects of this in more detail, and to interrogate the contradictions played out by boards as they deferred to ‘local logics’.

2. Discourses of Women and Leadership

The traditional discourses that draw on women’s role in the public/private binary (Ehrenreich and English 1978; Lather 1991b; Grogan 1996) have persisted and plagued women’s promotions into careers designated in the public sphere for centuries. Even in a country like New Zealand where the Prime Minister, the Chief Justice, and the Governor General are women, and one could be lulled into thinking that in the twenty-first century things are at last changing towards a more equitable society, one only has to cast an eye over transcripts such as my study reveals to realise how hegemonic these traditional discourses are. Grogan (1996, p. 82) found in her study of women superintendents in the United States, ‘one common thread in all of the stories is the presence of the binary opposition of male/female which unravels to expose the opposition of administrator/woman’,
One traditional binary discourse in my study centred round socio-biological notions of motherhood which have been critiqued in the literature by Oakley (1974, 1980). Some of the qualities of motherhood were positioned as positive to the role of the principalship, while in other locations they were not, according to the particular predispositions and 'local logics' being called upon:

M1 – They (males) are not the nurturers that the females are.
M2 – I don’t think they can handle the pressure like the women. I think that the women, who are the mothers, are able to handle the pressure of school and parenthood much better than males.
M1 – While doing ten things at once.
F – That’s it.
M2 – Instead of a guy who will do one thing really well?
F – Well men will do either one or two things when a woman can do twelve. I mean that’s a well-known fact.

(Board chairs of small schools with male principals: Int. 15, p. 5).

Both men and women propagate this discourse, but for different reasons. For men it maintains privilege to be associated solely with the public realm, and not to appear multi-skilled and successful in private matters associated with nurturing and parenthood. The abandonment of these responsibilities allows them to devote themselves wholly to the public sphere of work. For women these successes in the private realm can be valued in the public sphere, as the cultural feminist literature on 'women's ways of leading' highlights. Relational and nurturing qualities are seen to be positive factors fitting them for leadership (Marshall 1984; Noddings 1984; Neville 1988; Shakeshaft 1989; Court 1992; Enomoto 1997; Strachan 1999).
However, in another location with a different 'local logic', the responsibilities of mothering can also be the very thing that detract from women's success in this sphere. This contradiction is played out in the next two quotes as the attributes of maternal responsibility are debated, revealing the ambiguities and contradictions of particular discursive contexts where 'women-as-mothers' are positioned as contributing both value and problems to the principalship:

M3 - We're grooming a female teacher in our school who is young, but she's had a few years with us and is demonstrating leadership qualities. And again no children, no husband or no partner. So whether that will play a factor. I don't think it really would. I mean we are big enough now to know that maternity leave is just a part of life in employment.

M1 - We went through that with our female principal. She was probably the only person to have her kids that were born in the Valley. Everybody else was born in hospital and her kids were born in the schoolhouse.

M3 - That's commitment to the job isn't it?

M1 - Since she applied for the job and got in the job, she's since had two children and both were born in the schoolhouse up there. She was able to balance or juggle the two quite competently. We structured, I guess, her job in supporting what she wanted with regard to her work time and her motherhood time. We I guess felt strong enough for her to allow her that time and that space to be able to do both and she did them well.

F - Was she teaching as well or just......?

M1 - Yep, she was. She was a teaching principal.

M3 - Did she take maternity leave?
M1 – She did take maternity leave, but I think just – to
feed the baby, I guess. I think she was away probably
about a month. She had six months maternity leave,
but I think within that six months she was there most
of the time.
M3 – And you guys have found her flexible? She must
have brought the babies to school with her. Kids
would have loved it; get the whole whanau^{25} thing
going on (Board chairs of small schools with male
principals: Int. 15, pp. 15-16).

This dialogue can be read on two levels. A surface reading suggests there
has been a shift on the part of the board from the traditional discourse of
women as mothers first, principals/teachers second, and that the board
have been non-traditional in their acceptance of the situation where they
have accommodated the ‘mother/principal’ roles simultaneously. The fact
that the school was a Maori school may have had a lot to do with that
acceptance, because one of the effects of the high valuing of the family
(whanau) in Maori society, does mean there is less fracture between the
public and private roles of women (Pere 1988). Children are a much more
visible part of public life in Maori society than they are in the Pakeha world.

Reading this on another level, however, raises issues about responsibility
for childcare. As a mother this principal is constructed as having
responsibility for her own children, but as a principal she also has
responsibility for the students she teaches. Drawing on liberal feminist
discourses of individual choice and notions of ‘superwoman’, she is
positioned as having both a family and a career (Acker 1994), for example
– ‘she was able to balance or juggle the two quite competently’. However,
there are also issues raised about flexibility in this piece, and while the
responsibility for childcare appears to lie with the ‘mother’, the
responsibility for the flexibility to be both mother and principal, appears to
rest with the board. ‘We structured her job … with regard to her work time.
and her motherhood time'. 'We allowed her the time and space to do both'. Reading beneath the surface, enables us to see how this woman's role has been reconstructed by the board, from principal to 'mother/principal'. They have assumed the power in the employment relationship to control what she can and cannot do.

Of the two readings, the first is probably the most convincing, considering the cultural context, and overall, the board appeared to value positively the nurturing responsibilities of motherhood in this case. The same cannot be said about the next dialogue, however, as the same qualities of nurturance and flexibility are seen in a negative light:

F – Well I think women are more likely to say – I mean a woman can decide this year that no, this year she doesn’t even want any children. But in two years time that could be a totally different decision. I mean I know, I’m a woman.

M2 – Because they are prone to changing their minds?

F – If they have children already, I think a father can much easier say, "O.K. my child is sick, but I need to go to work" Whereas a mum feels really guilty. Well I would. I know, I do (Board chairs of small schools with male principals: Int. 15, p. 6).

These two examples expose the binary opposition of the public/private world of the 'mother/principal'. Both quotes were from the same focus-group, and interestingly, the more positive acceptance of the 'mother/principal' role was narrated and endorsed by male board members, while the negative interpretation was expressed by a woman. Gender bias by women against women is not uncommon in the literature, and is commented on in a small-scale British study by Burgess (1989), who observed that women candidates feared the judgement of women governors most, as they felt that they were making invidious comparisons.
with their own lives. The female board chair who claims: 'I mean I know, I'm a woman', is projecting her life experiences and values on to 'mother/principals' in exactly this way.

The contradictory discursive effects that emerge from the two previous examples of the 'motherhood' discourse raise problems for women principals. In some cases boards view motherhood positively, and in other cases, negatively, but it is nigh on impossible to predict which way a board will decide. In the next interview a principal advisor related the story of a very close contest for a principal's position between two women, one of whom was single and one of whom had a family. The position was won finally by the woman who was a mother:

Advisor: So there were two women who were the two preferred out of the five short-listed, they were the two that were the best candidates. I know why she lost. She lost it because she's not married.

Int: And that mattered?

Adv: Yes, it mattered. She doesn't have children. This other woman had all the same skills and they were quits. They were equal in every way and you couldn't possibly fault either of them, and in the end it came down to a decision about what type of person they would prefer. I mean they both would portray the right image, they both had all the credibility in every way that you could possibly think of. In the end they said, "Look she hasn't had children herself, this woman has and that makes a difference. She knows what it's like to be mother".

Int: And of course that wouldn't have been on the criteria anywhere?

Adv: Of course not and nor did they ask about it specifically

(Principal Advisor: Int. 8, p. 6).
It is difficult to imagine that the applicants' parenting status would ever have been an issue in this way if this decision had been between two male applicants to the principalship. It is also illegal under the Human Rights Act in New Zealand to discriminate on the grounds of family status.

In contrast to the traditional notions about motherhood and responsibility for childcare in the women and leadership discourse, are the different ways the women principals themselves interpreted being mothers and principals, and the balancing of these two roles. One woman saw the advantages the principalship offered her to control and organise her private and public life, which were greater than those she had experienced as a teacher:

F - I was a scale A at the time and I had young kids. I can remember we had swimming lessons one night after school and someone called a meeting and I couldn't go to both and I thought, "This is stupid. If I could call when the meeting was I could do both". So I decided at that stage, yeah, I'd go for a principal's job and then it would be me that was calling the meetings and it would fit both things - the family and school (Woman principal of large school: Int. 16, p. 2).

Another woman principal resisted the idea of combining work with a family for a while as she realistically considered the pressures of both:

Int: What has been the biggest juggle to you?
Pressures of whanau?
F - Oh yeah that has... Yeah, my partner - I'm a lesbian as well. My partner had a baby three years ago. We talked many years ago about the possibility, but as I got more and more into this job and got older I just forgot about it.
But obviously it was still something that she wanted to do. We talked about it and I said, "Well I don't know. I don't know how I'd be. I get home from work at night and I'm just absolutely totally stuffed and I sit in the chair and I fall asleep. I can't move, I can't do anything". So I talked to my DP here who's since gone, but we worked incredibly well together. I said to her, "Well I don't know what to do". She said, "Well you can go home from work, you can sit in the chair and you can be absolutely stuffed and you can hold the baby". I needed to think that that was O.K. I couldn't do this and - I didn't want to be a primary care giver. So I worked that out. That was a huge change too, being forty-five. Many people think that it's my grandchild, but that's fine. I don't mind at all. She's a treasure and I absolutely adore her (Woman principal of large school: Int. 9, p. 13).

The background context surrounding this situation is relevant and is indicative of radical feminist ideas. The board chair who led the appointment of this principal is herself a woman who appeared not to have any prejudice or concern around the principal's sexuality. It was never raised as a factor in her appointment. The staff also appeared to be supportive of the principal and her choices regarding family matters.

Another very experienced woman principal summed up the toll the principalship takes on families, and she worried it puts off a lot of women from applying to become principals. This resounded with the same concern raised by the NZEI Women's Caucus:

F - I work and work.
Int. - Family?
F - Family misses out...my feeling is that in many cases women are pulling away from the big jobs
because jobs like this take such a huge toll on you and on your family. I’m experienced and it’s taking a toll on my family. (Woman principal of large school: Int. 11, p. 14).

It was interesting to see the male principals also drew on traditional discourses about women when the same topic of juggling work and family was raised with them. They spoke about their wives being responsible for childcare and matters of the private realm. For them there was no problem juggling work and family because their wives provided a buffer by taking responsibility for after-school childcare and care of the home, leaving them to focus on work:

Int. - So how many of you have got partners, wives, families and how many of you find it really a struggle to juggle family and work demands?
M1 - No, it’s good now. [Laughing.] Seriously no, I think our relationship — my wife is a teacher as well, it’s the best it’s ever bloody been, which is great.
M2 - If your wife is a teacher, they understand the education system. If they understand that it makes it much easier.
M3 - I invested the time on my own kids then and I coached my son’s rugby team when he was younger. That was that decision. Holiday and making sure I had a decent holiday with the kids and my wife. But now the kids have left home. I think we make it home one night a week together, but that’s O.K.
M1 - I try avoiding it though because I think that going back to school and things like that can be lonely for the other person if they are just waiting around in the house doing their thing. So I avoid going back to school.
M4 - Do you take the laptop home?
M1 - Yeah.
M5 - But it varies. If I don't go out, my wife says, "Why aren't you going out tonight? I like you when you are away". She gets to control the remote.
M6 - But in saying that, we are probably all in that area where our kids have probably gone, so we haven't got quite the family demands as when we were younger.
M3 - When the kids were there with all their interests, it did put an awful lot on your partner as far as running kids to ballet and this, this and the other thing.
M1 - I'm right in the middle of it (Male principals of large schools: Int. 20, pp. 50-51).

Most of these men had older children, while only one still had school-aged children (M1), and he appeared to be the most aware of the burden the family responsibilities created for his wife, who was also a teacher. She was obviously doing most of the juggling of work and family. The rest of the men did not have to juggle family responsibilities with work because their children were older and had left home, but it appears they mainly off-loaded childcare to their wives when the children were younger. So, for most of the men, in comparison with the women principals, there was not an issue of juggling both roles. This is backed up in the literature by Watkins (1993) and French (in Itzin and Newman 1995) who show how power becomes synonymous with the senior management role because of the distinction between public and private work and the assumption that there will not be a necessity to juggle both. The wives were represented as principal carers (Coleman 2002), caring for the male principals, their children and their homes, while taking on their own careers as a secondary responsibility. The men were concerned purely with work and on average they estimated they worked 50-60 hours a week on school affairs. The women principals, in contrast, estimated they worked an average of 70 hours per week. Most of the women were also studying, while very few of the men were (Interviews 16 & 20).
Single Women Discourses

Sociobiological discourses were used by boards vicariously to position women positively and negatively in terms of leadership. There was no predictable clarity throughout the study about what counted as suitable leadership, because of the predispositions and local logics being called upon by boards in different locations and with different histories. Marital status was also used by boards to exclude women from the principalship. The discourse of single women was drawn on in the following discussion and was linked to issues of safety:

M2 – An issue with our female applicant was that she’s single and that – she would be mid fifties to sixty range age group, and she was going to be in the house by herself. That was a concern of the board’s.

Int: Was it a concern of hers?

M2 – She was – well she was concerned. She was going to commute and then she said that well maybe she would stay in the schoolhouse for five days of the week and then commute home to her property in the weekend. At the interview it was a question raised by one of the other females: “How would you feel staying in the house by yourself, because your nearest neighbour is a kilometre away?” She didn’t actually really clearly address the issue. She didn’t say, “Oh I’m a black belt in Kung Fu, I will look after myself” type of thing. She sort of said “Oh well maybe I’ll only be here during the week” type of thing.

Int: And yet you probably wouldn’t have asked that same question of a single male?

M2 – Unless he was homosexual (Board chairs of small schools with male principals: Int. 15, p. 52).
Looking beyond the illegal and blatantly homophobic last statement, there is a contextual qualification to this paternalism which is local and historical, but which needs to be understood in the light of self-managing schools and the board's culpability and responsibility to provide safe working conditions:

M2 – But just thinking of it now, I would hate to be a board member that was dealing with something like happened at (place name) a couple of years ago. I would have hated to be on that board dealing with those sorts of issues.
M3 – That kind of experience will always sway you.
Int: - So what happened there?
M2 – Oh it was a female teacher who was attacked and eventually she died after it. It ended up being a family member that did it, but...
Int: - But the board couldn’t be held responsible for that could they?
M2 – Being the employer and if it happened in a school house - that type of thing.
Int: - Even though you have no control over it.
M2 – You’d sort of be turning around and saying, “could we have made the building more secure” or something like that. Maybe one the latches was broken on the window or something and nobody had said anything.
M3 – But then being a family member, they would just walk through the door (Board chairs of small schools with male principals: Int. 15, pp. 50-51).

While it is understandable that there may be this concern, there is also evidence that these male board chairs are drawing on the traditional discourses about women needing ‘protection’ in their public/private lives. They are extrapolating from one incident, and claiming all women need
male 'protection', particularly the most vulnerable group of single women. The board member (M3) was the only one not to buy into this discourse.

Another discourse drawn on relating to single women is the discourse of heterosexuality which spinstershood challenges with its 'illegitimate' sexuality within patriarchal heterosexual relations; a critique documented by radical feminists in the 1970s (Daly 1978; Rich 1980). Small country communities sometimes resisted women for reasons related to their sexual identity as young, single women, according to one principal advisor:

M - There are a couple of reasons why women board members often display a preference for a male principal. It is what I call the 'pecking order factor' and the 'jealousy factor'. Professional women principals earning $60,000 or more, threaten the status of other women in a rural community, particularly when most are housebound wives and mothers with no comparable income or career prospects. For those that measure pecking order status in dollars (and many rural people do) then the once stable pecking order of a community can really be rocked with the arrival of the professional woman, especially if she is oozing ambition, jewellery and a flash car. This in turn activates the 'jealousy factor'. This can be really intense if the new woman principal is also (i) young, (ii) single, and (iii) likely to be attractive to the local husbands/males. Rural women have a way of dealing with these threat factors – resist the appointment, or if already appointed...find some other strategies (various forms of bullying emerge). You might not like what I am saying but I have experienced both happening (Principal Advisor: Int. 7, p. 1).
This quote emerged from the interviews with principal advisors as rather unusual. There were no other reported instances that were similar, and while it may have been genuine evidence from his experience, it resounded with classist and sexist prejudices about rural women who were depicted as 'catty bitches' in an essentialist way. Notwithstanding this, some New Zealand rural communities do present as conservative and parochial with a well-established local social hierarchy. Newly arrived members to the community are sometimes regarded with suspicion and distance until they prove themselves to be worthy of attention, before being integrated into the existing social strata. After living in a rural community for twenty years and teaching at the local school, I was reminded of this myself, when an angry parent told me once that 'I should remember my place - I was no more than a Jap. import to the district'. He was using the metaphor of the flood of Japanese cars that had been recently imported into the New Zealand market, to put me in my place!

The above quote also drew on another discourse that emerged frequently in the interviews – that of youth and age. Many male principals were appointed because they were young, seen to be energetic and 'going somewhere'. The opposite was true for many women principals who were often older when they applied for a principalship. The combination of ageism and sexism was a particularly challenging state in the women and leadership discourse.

**The Sexism/Ageism Combination:**

Discrimination on the basis of age appeared to be a common covert practice with a number of the boards in the focus-group interviews, and it was also spoken about in the principals' focus-groups and the principal advisors' ones as well. While both genders were affected, so that any principal in their fifties applying for a job was assumed to be looking for an easy ride into retirement, women as a group appeared to be more
negatively viewed. Comments from the board chairs validated this ageist discourse:

M – What we ended up getting was a lot of, I would say, people who have been in the education system for some time, about to retire, and really looking probably to a holiday through until a period in which they retired. Quite a bit of that (Board chair of large school with woman principal: Int. 17, p. 11).

M – There was a bit of an age gap between the successful applicant [inaudible] and admittedly the one that got the job was the youngest. He was on the up. You’ve also got to look how long the principals stay in the job. If they are appointed at fifty years of age, then probably – they will go through their time and – you do come across schools that do get tired because the principal gets tired.

F – But I must admit – we did actually say at one stage we didn’t want to appoint someone who was just going to sit there until they retired because a school should be leaning forward (Board chairs from large schools with male principals: Int. 22, p. 13).

One of the effects of the new reforms has been the huge increase in the principal’s workload (Livingstone 1999; Wylie 1999; Whittall 2001; Collins 2003) and boards have a clear understanding of this. The discourse surrounding the most effective post-reform principal includes energy, commitment, hard work and being positioned on the ‘way up’ in the career ladder, which are all qualities attributed to youth:

M – He’s a younger guy who wants to move ahead and we’re a small school. We are a stepping stone school, so we wanted somebody with the enthusiasm
who wanted to progress up the line and was going to make a good job of their first job as principal. The two that we finally interviewed, one male and one female, the female was at an age where she was looking for a comfortable job to work through to her retirement and that didn’t suit us (Board chair of small school with male principal: Int. 15, p. 3).

F – I was looking for high energy enthusiasm (Board chair of small school with woman principal: Int.13, p. 25).

Int: – And what was it that was the edge that “Tom” had on the others?
F – Well for one it was his enthusiasm. It was a challenge to him. He was young, but mind you they all were. They were all in their thirties.
Int: – And were there no older applicants?
F – We did have a couple of older ones. They weren’t short-listed though (Board chair of small school with male principal: Int. 36, p. 7).

The principal advisors endorsed these findings about ageist appointment practices. They found many boards who were not unhappy with the way things had been going with their past principal, but who seemed to think that fresh young blood would always be a positive choice:

F – Then there’s the group in the middle who think we’ve had a pretty good run, but it’s certainly time for a bit of a fresh approach in here. So they tend to be looking for younger people than an experienced principal because they are wanting a bit of rejuvenation or re-energising. Not unhappy and not
dramatic change, but an injection of enthusiasm
(Principal Advisor: Int. 8, p. 11).

One finding from the literature which backs up these comments is the
homosocial effects around age. Notman (1997) noticed a tendency for
school boards in New Zealand to appoint people of a similar age to
themselves, because they shared similar experiences. Considering the
average age of most parents of primary school aged children, it was not
surprising to find this preference for younger principals in my transcripts.
This trend was also commented on by the principal advisors:

F – One of my issues of concern is the age and
gender composition of boards generally, when you are
working with primary schools. If you have got children
at primary school, they (the board members) are
pretty much inclined to be in a particular age bracket,
perhaps late 30's early 40's; more so than there used
to be before Tomorrow's Schools first started. So
perhaps you think that people in their 50's are quite
old compared to you. Actually it's an unspoken thing,
it's a feeling that I get really. So they are going to think
that if someone has been in a job for twenty-three
years, they are going to see that as a negative. I can
tell you that because they have voiced that (Principal
Advisor: Int. 2, p. 5).

The preference for youth was validated also by several of the women
principals, some of whom had recently attended the First Time Principals’
Training conference, the initiative described in Chapter Five. Several
women spoke of the worryingly high number of very young inexperienced
teachers who were at that training and who had just won their first
principal’s job:
F1 – Well I tell you what was also quite interesting is just being up in Auckland at that First Time Principals’ Training and meeting the very varied group of people who were first time principals. One of them was a beginning teacher.

F2 – Astounding, but I was reading something on Leadspace the other day and some guy introduced himself and he was a third-year teacher (Women principals of small schools: Int.6, p. 3).

This observation was backed up by a male principal from a large school:

M1 – Well I visited a school at one stage where the principal was a beginning teacher and wasn’t even provisionally registered...and it was a two teacher school (Male principal of large school: Int. 20, p. 22).

Ageism seemed to apply to both genders. The advisors reported on several male principals who had said “at my age, I’m not going to be considered” (Int. 2). Even the male principals from large schools seemed to be doubtful of their chances of winning a new principalship if they decided to try for one:

M – It would be interesting to see what would happen if a lot of the principals in (this region) tested the water by all applying for jobs elsewhere and see how many got short-listed (Male principals of large schools: Int. 20, p. 17).

Even though some males’ career paths appear to have been foreshortened by ageist appointment practices, the effects can be more dramatic for women, as the risk is they may not even get started. The preparation for the position of principalship has often meant women have not applied for their first job until their late 40s or early 50s. In a study of
primary headteachers in Britain, Hill (1994) found the average age of attaining their first primary headship for women is 40-49 years, and 35-39 for men. The discrepancy was explained by career breaks. The women principals in my study validated this and spoke about taking longer than their male colleagues to reach the point of applying for their first principalship. They talked about broken service for family reasons, spending longer in the classroom gaining teaching experience, spending longer in senior management jobs and taking time to study and qualify themselves for the principalship before applying. This too is verified in the British literature where in spite of men and women not expressing dramatically different career aspirations (Hill 1994), men were promoted more quickly, and on average, did not have more years of teaching experience (Davidson 1985).

Most of the women principals in my study were older than the average age of parents and board members at their schools. The woman in the following dialogue had spent over twenty years gaining experience in primary, intermediate and secondary schools, had taught for four years in the private system and had senior management roles before she felt she was ready to apply for her first principalship:

F1 – So I’ve had quite a good look around at systems and decided I’ve looked at all the different styles of leadership and thought, “Yeah I know one day I can get there”. But I’d also made a conscious decision really that I was also going to look at my own family as well. I’ve got a child in the fourth form and I decided that to be fair to him, even though a senior management role was busy, that I still wasn’t going to put myself up into the next job until he started high school. I’m really glad that I didn’t because last year, I reflect back and think “crikey how much time did I?” – I mean don’t get me wrong, I’m not a bad mum and I go to his sport and I’m still involved in all those thing,
but I do know that I haven’t seen as much of him and that’s worried me a little (Woman principal of small school: Int. 6, p. 31).

Family commitments expressed here mirror the literature on double and triple roles (Acker 1994), which account for why many women are older when they apply for their first leadership position. Ninety percent of the women interviewed by phone suspected ageism had been a factor in them missing out on principal’s jobs at some stage in their career. Several spoke about missing out on jobs only to find later that a younger, much less experienced, less qualified male had been appointed instead. One such story documenting this is attached as Appendix Seven.

The women principals from the large schools summed up the sexism/ageism dynamic operating against them, with humour:

F1 – I really believe - if you are a fifty year old man and you’re a fifty year old woman, put the two up, the man has got far more chance than the woman if you take other things out. 
F2 - I’m going to have a face-lift. 
F1 - But I mean a middle aged man is distinguished. A middle aged woman is...
F3 – Tired (Women principals of large schools: Int.16, p. 36).

The recognition of the social valuing of masculinity and the links to authority which increase with age, is contrasted to the opposite effect occurring with femininity in this conversation. The other point worth noting is the way the conversation developed. The ‘script’ of this social valuing is so well-known and so culturally ingrained, that the three women were able to speak it as one voice, all obviously on the same wave-length and even finishing sentences for each other.
The Problem of the Gender Diversity of the Principalship
Summarized

Bacchi (1999) refers to how different representations compete in how a policy issue is defined. It became increasingly clear as the transcripts from the boards were analysed that there were multiple representations of the problem of why women were not considered suitable candidates for the principalship. These drew on masculinist discourses of leadership which linked beliefs about the ability to effectively discipline, and competencies in team sports, with notions of heroic (male) leadership and providing role models for boys. These in turn were positioned against discourses about women and leadership which were mainly negatively viewed by boards, but which sometimes were unpredictably viewed positively, a lack of predictability that made it difficult for women to comprehend their position. The range of representations and the inconsistency of ways of viewing these by boards, as they drew on the repertoires (Burr 1995) available to them as a result of their particular predispositions and ‘local logics’, made it impossible to come to any final fixing of meaning or generalised conclusions about the problem. A closer and more fine-grained viewing of the problem was obtained from the analyses of case studies of actual appointments.

Case Studies

An analysis of the three case-studies in my research revealed evidence of discourses inflected by gender being drawn on in decision-making. In the first case-study where a woman was appointed principal, she was clearly ‘the best person for the job’ on criteria of seniority, experience and qualifications. She had been a successful principal of a large school before and she was better qualified and more experienced as a teacher than the other applicants. She impressed the board with her ideas for progressing the school forward and was very knowledgeable on Treaty of
Waitangi issues, which were important for the large Maori student population. Her main competitor was the male Deputy Principal at the school who had been ‘groomed’ for a principalship by the former male principal, and who had been acting as principal since his resignation. He was however much less experienced in both principalship and teaching and was younger than the woman who won the job. Some board members however, in spite of recognising her superior merit and the EEO principles involved, felt that a male principal was what the school needed to control, manage and discipline the older boys. One panel member found the whole process emotionally wrenching, and she felt disloyal for not appointing him:

F – I actually found it extremely difficult. I considered not standing for the board again. I mean – I did find it very, very difficult. And I think because he'd been my daughter’s teacher as well, and my son’s – but they’d both had him in the last few years, and we were very good friends through cricket and things like that, that made it extremely more difficult for me. But on the day we have to put all of that aside, which we all did. But afterwards, the repercussions afterwards, like I felt I couldn’t come into the school for a few days because I knew he was so devastated. I just wanted to hide. It took me about four or five days before I could come in (Int. 32. p. 4).

Most recruitment is carried out in relatively objective circumstances. Usually the recruiter will be unknown to the applicants and will have been trained to carry out the role. In the case of lay members of a board who have not received training, but who may know or even be friendly with some of the applicants, the circumstances can produce emotional and stressful responses. In this quotation, the board member had emotional ties with the incumbent deputy principal through friendship, sporting associations, as well as the fact that he had been her children’s teacher
for a number of years. Her loyalties to him make it difficult to distance herself from him to objectively carry out the appointment task, and the end result became a burden for which she felt responsible.

In the second case-study a male principal had been appointed, and again discourses inflected by particular understandings of gender were mobilised. In this case, discourses of heroic leadership to act as a role model to the boys and masculinist corporate discourses were drawn on, as the school board progressed a market agenda in its appointment. As it is the only school of the three case-studies to illustrate the market discourses, I discuss in Chapter Seven in more depth the case-study of 'Enterprise School', where masculinist leadership was integrally intertwined with corporate market discourses.

The third case-study drew on gender and educational discourses, as I observed the process of an appointment being made. While this case-study doesn't typify an appointment being made solely on the basis of gender, as some of the cases mentioned in the focus-group findings did, it does represent an example of gender discourses being used to disrupt, interrupt or threaten an otherwise fair appointment process in the final stages. Because it illustrates quite clearly how 'local logics' operated at the final decision-making stage, and how easily this can happen, I discuss it now in some detail. I have named this case-study 'Neighbourhood School' because the appointment reflects the original official policy discourse of 'Tomorrow's Schools' of democratic partnership involving the community.

**CASE STUDY: 'NEIGHBOURHOOD' SCHOOL**

'Neighbourhood School' is a full primary, U6 (roll over 500), decile 3, urban school in a working-class outer city suburb, catering for a multicultural student population. The retiring male principal had been highly respected and liked by the staff, board, students and community and the school was considered by ERO to be performing well educationally. The board were very happy with, and proud of the way the school was progressing. This
local logic informed how they saw the principalship. They were looking for someone who would continue the good work and keep up the momentum, but not change the direction too much. After considerable effort by the board to consult and work with the community a shared philosophy had evolved that teachers and parents were happy and familiar with. A great deal of work had been done in the school to make it an emotionally safe environment for children and to expect high standards from teaching programmes and the students, and for a low decile school this was seen as important and reflected in their vision:

At Neighbourhood school we value a holistic approach to education encouraging the students to grow academically, socially and culturally. We value our status of being a No Hurting School. A heavy emphasis is placed on the development of social skills with a school-wide programme operating. Providing a safe emotional and physical environment and developing strong links between home and school are given priority (School Statement, 2002, original emphasis).

The meetings held by the board for this appointment, which I also attended, were:

- Initial meeting – where the process for the appointment was discussed, the appointment criteria, job description and person specifications were discussed and decided on, and the content of the advertisement and the application pack were established.
- Short-listing meeting – where the four people (three males and one female) were short-listed from ten applicants, including two women.
- Interview preparation meeting – where the questions for the interview were decided and the process for the interview established. At this meeting a selected group of the panel reported back on the visits to
schools made where the panel had observed the candidates in their local setting.

- The interviews - where the four short-listed candidates were interviewed by the panel.
- The decision-making meeting where the principal was selected, which was held immediately after the last interview.

Initial meeting

The appointment panel comprised nine board and staff members and a principal advisor. There were two male board members, including the chair, and seven women, including the staff rep. and one of the deputy principals who was seconded on to the panel to provide educational advice from a senior management perspective. At this first meeting also in attendance was the retiring principal who was asked to give guidance to the board in the absence of the principal advisor who was unable to be present.

The whole appointment process was discussed and agreed upon at this meeting, including a time-line and the number of meetings that the panel would need to have to complete the process. The tasks set for this first meeting were then completed. They included deciding what the appointment criteria and person specifications should be, and then wording the advertisement and putting together the application pack. It was a four hour meeting.

From the discussion at this meeting it was clear the board had a very strong perception of what they wanted for their school, which had emerged from community consultation and working to a strategic plan which incorporated their vision (above). They were not looking for change, but wanted someone who would carry their strategic direction forward.
Short-Listing Meeting

The panel had all read the CVs previously and very quickly voted on the first preferred three candidates, then debated the fourth. They discounted all other applicants as not meeting the set criteria. Ageist and gender discourses were drawn on in some of these decisions. One applicant was fifty eight and considered too old, and one of the two women was considered to be 'confrontational and aggressive with staff'; information which was said to be 'local knowledge':

We’re a strong school and we want somebody that's going to acknowledge where we are at and take us further, but we don’t need a heavy handed style to do it (Int. 38, p. 7).

The incumbent woman deputy principal who had applied for the position appeared to be the preferred person for the job as she, along with the principal, had been instrumental in putting a great deal of the structures, practices and programmes in place to get the school to where it was. She was also reported to be well respected by both staff and board and had a 'glowing' referee's report from the retiring principal.

Interview Preparation Meeting

The questions for the interviews were compiled under the direction of the Principal Advisor, and they drew from the criteria and person specifications lists (see Appendix Eight). In my opinion this process was well done with the questions reflecting the qualities and criteria for the job that had been previously agreed upon, and apart from wanting 'God' from the unrealistically long person specs list, the board had acted consistently. The questions were then shared out to be asked by each member of the interview panel. The second part of this meeting was a report back to the panel by three members of the board who had been instructed to visit each short-listed candidate in their own school setting. This was
interesting because the person who the board had been least impressed with at the short-listing stage now moved up to 'first equal' along with the incumbent, as a result of an impressive visit. He was the youngest male candidate, but appeared to reflect very similar values to what the board were looking for, according to board members who visited his school. The other two male candidates were almost cast out of the race as a result of their visits, but the board decided to wait and see what the interviews revealed. The visit to the incumbent was commented on as being a difficult procedure to judge fairly because all three 'visitors' knew her and the school so well. However, a professional summary of the event was delivered.

The Interviews

All four interviews were held on the same day, with a short discussion time between each one. After the questions were asked, the candidate was asked to do a presentation that they had been forewarned to prepare. In terms of proper process this stage also was conducted professionally and fairly. In summary, the candidates confirmed for the panel a great deal that they had discussed at the meeting about the school visits. There were no surprises with the incumbent or the two older male candidates. The youngest man though did continue to impress the rest of the panel that had not visited his school, and it became clear that the incumbent did have a serious competitor.

Decision-making Meeting

The Principal Advisor chaired this meeting and worked through a fair and consistent procedure to come to a consensus and final decision. In the discussion the two older males were deleted from the list for various reasons which conformed with criteria and person specifications as well as the school and community ethos. It was now down to the female incumbent and the young male, and it was here that gender and ageist discourses threatened to disrupt an otherwise flawless appointment
process. The incumbent still appeared to fit the job description, person specs, and community and school philosophy best, but there was a feeling that the other person could possibly meet many of these criteria too, even though untested. However, two board members raised the issue of role-models for boys, speculating that there were many boys from single-parent families, and maybe their school would benefit from a male principal. Others raised the question of his youth, energy and enthusiasm. None of these issues had been raised at any earlier stages, or were specified criteria, and while they were discussed at some length, the majority finally decided that the person they knew, who was doing such a good job with the school in taking it forward in the direction they wanted, was the best person for the job.

In my view this board did an excellent job of thinking about what they needed for their school, documenting that in an official way, conducting the appointment process professionally and ending up appointing the person who best matched those stated criteria. However, I was able to observe first-hand how this process could have so very easily been disrupted and have different outcomes, sabotaged by ageist and gender discourses combined with 'local logics'.

Summary

The findings of this chapter reveal that the discursive effects of gender are played out in varying idiosyncratic ways in board appointments to a greater or lesser degree depending on 'local logics', historical and/or locality influences, and the influence of discourses mobilised by the media. At the school and board levels gender appeared to play a more prominent, even if unpublicised but negative role, than the official policy discourses at the national level intended. In the main, women are seen as less desirable as principals than men. In the next chapter, which looks at the effects of market discourses and how these have interacted with 'local logics', the opposite seems to be true, but on closer analysis there are qualifiers to this finding.
CHAPTER SEVEN

DISCOURSES OF THE MARKET

The restructuring reforms of 1989 emphasised New Right ideals, the philosophy of the market and economic rationalism (Codd et al. 1990; Ball et al. 1992b), and policies of the New Zealand model of new public management (Boston et al. 1996). As discussed in Chapter Two, the official discourses that emerged in the texts of ‘Tomorrow’s Schools’ and the Education Act (1989) reflected this. These market discourses were taken up and interpreted variously by a particular group of school boards in the process of appointing a principal.

Educational governing bodies in New Zealand were never formally legislated to include members of the business community as they were in the United Kingdom with the 1986 Education (No 2) Act (Punter 2003). There was a provision, however, to co-opt members from the community to compensate for skills that may have been lacking on the board, and many boards have co-opted accountants, lawyers, plumbers and the like to provide services of a specialist nature, particularly from within the business community.

This study indicates that some schools increasingly behaved like commercial enterprises in the field of appointment practices, particularly around notions and practices of competition, choice, privatisation, entrepreneurialism, contractualism and marketing. These have significant implications for both education and recruitment of principals. In this chapter I discuss how notions about the market were drawn upon to inform boards’ appointment decisions. The process of ‘marketisation’ of the work of education occurred in four ways. First, the notion that competitive markets produced particular preferences in who was selected; second, boards were increasingly needing expert advice and drew from the business practices to improve their financial situation and capabilities; third, there were moves by boards to adopt business-model appointment
practices; and finally, there was a strong masculinist culture that was associated with marketable characteristics such as entrepreneurialism, contractualism and marketing.

The trend of schools behaving like business enterprises has been found to occur in other countries where self-management policies exist. Gewirtz et al. (1995, p. 90) found in their study of schools in the United Kingdom, that:

The policy of devolved management in combination with open enrolment and per capita funding...which drew on new business management theories, was that by giving headteachers and governors control over their budgets and by making school income dependent on attracting custom, senior managers in schools would have both the tools and the incentive to behave in more cost-effective, flexible, competitive, consumer-satisfying and innovative ways. In other words schools would behave more like commercial enterprises.

In Australia, Taylor et al (1997) found a number of private sector practices had been incorporated within state educational practices, and the relationship of people to the state had been reconstituted from one as citizens to that of consumers of education services. She commented on how even the language in which education policies is expressed is premised on market considerations and borrowed from the commercial world. In my study the language and practices of business was most prominent in boards from large urban schools, particularly where the board chairs themselves were in business. In the large school focus-groups, several of the chairs were high-flying male business executives and some were chief executive officers of their companies. They were also almost all from high status, high decile, large schools in urban centres. This finding is consistent with the British literature, where Deem and Brehony (1994),
Punter (2003) and Gewirtz et al. (1993) found the attitudes and values of school governors who came from similar backgrounds of business, important in setting a market agenda for schools.

1. Competitive Markets and Principal Selection

A common feature of the interviews with the members of the boards was the mobilisation of discourses of the market, such as the mechanisms of competition, choice and marketisation. These were drawn on where it suited the local needs of the school, so that they became a form of ‘local logics’ that informed the selection process. Competitive markets produced particular preferences in who was selected.

**Competition**

Competitive behaviours have always been pervasive in education, but usually between students rather than institutions in the public schools sector. The reformers argued however, that competition was needed in schooling to force up student achievement through teacher performance (Treasury 1984). Since the reforms, competition has also been noticeable in the education labour market (Marginson 1997). The notion of competition derives from public choice theory, where it is believed essential to curtail the self-interest of professionals and bureaucrats in their endeavour to maximise individual gains (Boston et al. 1996). The intention instead, is to ensure the interests of clients or stakeholders are maximised, and the mechanism required to do this is competition. Board chairs were working to a premise that the greater the competition surrounding particular schools, the greater was their chance of appointing a high quality principal who would maximise the interests of their clients. They had a strong sense of the hierarchy of schools and their positioning within the local school markets, and competitive market discourses were frequently drawn upon by them in my study, when making reference to what constituted ‘quality’ schools:
We are a decile ten, 720 roll. We had fifteen applicants and I have to say that the majority of them were of a very high standard. It was probably one of the top jobs being offered over the recent months in the market. The standard was high and it was really hard to get down to five, very very difficult to give them all justice. Quite a challenge really.

(Board chair of large school with woman principal; my emphases: Int. 17, p. 7).

These board chairs had an astute understanding of the qualities desired in a principal who would perform in a way that would ensure the school retained a competitive edge. This meant attracting a large pool of high quality applicants so that they could choose the best principal to protect their competitive advantage in that hierarchy of schools. The size of a school directly effects its competitive rating, with the larger schools usually attracting a higher numbers of applicants. The assumption in the statement 'one of the top jobs' is that along with the high decile and by implication high status schools, applicants will be attracted by the higher principal’s salary of a large school, where there is a difference of $35,000 between the smallest and largest schools.

However, closely aligned to size is location of the school and associated lifestyles. One region in New Zealand deemed ‘desirable’ for lifestyle reasons, according to the principal advisors from that region, had disproportionately higher numbers of applicants competing for principals jobs, than I found elsewhere, indicating salary is not the only priority:

M3 – See it’s interesting that there’s been an appointment made (here) recently and the principal there has actually taken a (financial) step down and he told me, it’s lifestyle...So we are going to get
that...outsiders coming in and leaving big schools.

M3 - Large schools are no problems. They are drawing some wonderful fields. Wonderful fields...we are talking 36–40 applicants and the quality of the applicants is absolutely fabulous (Principal Advisors: Int. 21. p. 29).

In these cases principals traded off the highest salaries of the biggest city schools to relocate to a smaller school in a more desirable location. When this happened boards were spoilt for choice with large numbers of candidates from which to choose. Furthermore, in such desirable locations there are usually high numbers of male principals, as in one of the regions in the study, where there were only two women principals in a city of 50 schools. Whittall (2001) found similar results in his study in the Nelson/Marlborough region of New Zealand, another area deemed desirable.

**Market Choice**

Competition is closely aligned with the concept of choice in market discourse; the principle being that choice creates competition, and that this in turn leads to improvement. Most of the choice literature in the education reform field is about parental choice and the panic responses of flight where parents withdraw children from perceived 'poor or failing' schools (Codd 1993; Gordon 1994; Gewirtz et al. 1995; Glatter and Woods 1995; Lauder et al. 1995; Thrupp 1999; Fiske and Ladd 2000). There appears to be a gap in the literature on the choice of principals, and yet parental choice of schools for their children is often related to the reputation or quality of the principal at either the school they leave or the school they choose. Codd (1999) points out that the notion of 'quality' is used as a form of managerial control in the New Zealand new public management
model, where managerial effectiveness is seen as the key role of the principal to ensure school improvement.

Within the principal employment field, the capacity of boards to choose a principal with a 'high quality' reputation is also related to the condition of scarcity, i.e. the supply of high quality principals as well as the capacity to attract them to the school. In choosing a principal, most boards in the larger, high status schools in my study expected to have a wide choice because of the nature of the school. An interesting paradox emerged in the study however. Boards espousing the strongest market discourse, who one assumed, had the widest choice of candidates to choose from, appointed women principals to their schools. This appeared to contradict past research where the individualism of the market has been seen to work against women (Middleton and Oliver 1990), and where the concept of managerialism is seen as highly masculine (Blackmore 1993a). In each case the 'market-oriented' boards had chosen women principals because they 'stood out' in terms of quality, and thus met the EEO merit principle. However, the rest of the candidates were not of the same quality which seemed to surprise these board chairs, as it left them with reduced choice:

M1 - We were disappointed with the level of candidates. One person stood out and we found it difficult to even have people almost on the short-list to stack one up against it. It was certainly a problem for us, but we then faced, do we re-advertise, and in the end we stuck with the person...

M2 - We had the same thoughts. It would have just been nice to have actually had somebody else, to sort of say, well there is at least a game to play here. But it wasn't that to be honest (Board chairs of large schools with women principals: Int.17, p. 8).
The interviews provided a more nuanced understanding in each school. The board chairs stated their appointee was the best person for the job, but out of a 'disappointing field of applicants'. They interpreted it to be a disappointing field because there were no males to 'stack up against' the top woman. In other words they considered their choices were limited, so therefore they interpreted this lack of competition as a failure of the market.

At this point in the interview I asked the board chairs why they had appointed a woman principal. All responded that it was because they were the best person for the job, but one chair qualified this with the underlying reason, that made it clear that a male would have been preferred:

M3 - The best person got the job. I have to say there was considerable feeling amongst a lot of the parents that they would have actually preferred a male to be appointed (Board chair of large school with woman principal: Int.17, p. 8).

Even although the board chairs stated that the women they appointed were 'head and shoulders' above any other applicant, they were surprised and dissatisfied that there were no male applicants of equivalent ability to choose from. The market had failed because a male leader, the scarce commodity, did not materialise.

M1 - We were actually disappointed with the candidates overall.
M2 - You just had the one?
M1 - Yes we had one person who was clearly way above the others and we were actually disappointed that we didn't have, I suppose, somebody else stacked up against them (Board chairs of large schools with women principals: Int. 17, p. 34).
In spite of the fact that the school was to benefit from a highly competent principal who had won the job on merit, and was 'clearly way above the others', the disappointment expressed by the board chairs positioned these women as 'failures', who it is implied, got the job by default.

On interviewing the women principals from the large schools it became clear that they were indeed outstanding candidates for the principalship, and of a much higher calibre than the average principal. Of the ten women in the focus group, two were enrolled in PhDs, four had or were nearly finished a Masters degree, one had an MBA and had published overseas (an interesting business choice), all were constantly professionally reading, all but one had over ten years of teaching experience and senior management experience, and some had been principals before. One woman who applied for a job, won it the second time round after the board had re-advertised. She commented:

F – Then they gave it to me the second time around...but I get the feeling that they would have liked me to have been a man. They would have liked a male with my background, my qualifications, my knowledge of the community and my profile (Woman principal from large school: Int. 11, p. 7).

The second advertising round was obviously designed to attract an equivalent male applicant, but when the market failed to produce one, the woman who should have won it first time round, was appointed. As Amanda Sinclair (1998, p. 179) says, women and leadership don't go together 'without requiring special designation as the exception to the rule'. In this case the market failed to produce a male candidate who matched the 'special designation' of this principal, in terms of experience, qualifications, expertise and a recognised reputation (profile).
These board chairs' responses are consistent with agency theory, as Boston and his colleagues (1996) explain it. They are in a principal–agent relationship in a pre-contract situation, which is complicated by incomplete or asymmetrical information, where they are positioned at an information disadvantage known as adverse selection. They don't have access to all the information about the applicants they are having to choose between, and it is difficult to observe the things they need to know, such as character and ability. Because the board cannot know for certain the applicant's 'true type' they risk making an adverse selection. I would add a feminist interpretation to this argument, and suggest that agency theory incorporates a 'male as norm' assumption, so it follows that 'true type' is associated with male qualities, and therefore the risk is doubled by selecting a woman principal. The board chair's dissatisfaction at the failure of the market to produce equivalently competent men whom they would have had more confidence in, because they would have more certainty about a male's 'true type', leaves them in a very risky situation of making an adverse selection indeed!

**Parental Choice**

Increased opportunity for choice of schools by parents, through removal of zoning, has been one of the most dramatic discursive effects of the market New Right policies (Lauder et al. 1994). In New Zealand, one of the most profound effects of this was the disruption of the longstanding discourse of egalitarianism prominent in education up to that time. In reality, egalitarianism was a myth, as the wealthy have always had the option of sending their children to private schools, indicating a quasi-market situation. However, over-riding this was the right of every parent to send their child to their local school and be confident that they would receive an education of equal standard to any other public school in the country. In England, Deem and Brehony (1994 p. 2) also comment on how the quasi-market affected the activities of school governing bodies of state schools, and the idea of 'state education for all'. The market reforms supporting parental choice had a deleterious effect in many schools, creating 'poor'
schools and 'good' schools (Gordon 1994; Whitty et al. 1998; Lauder et al.
1999), as the vicious cycle of 'flight' from perceived 'poor' schools took
momentum.

In New Zealand it took twelve years of parental choice policy to persuade
the government to intervene and try to undo some of the worst
consequences of it, including school closures. Since 2002 the re-
introduction of enrolment zones has protected the right of children to
attend their local school. However, the damage had been done in terms of
the public waking up to the fact that schools are now not the same, and
the discourse around the notion of 'quality schools' or 'winner and loser
schools' creates confusion and concern for parents.

The board chairs in the large schools were very conscious of the power
play they were inextricably bound up in, in terms of satisfying their parent
clientele by appointing a suitable highly performing principal who would
continue to enhance the good reputation of their high quality schools. They
were well aware of the threat of privatisation (Chitty 1989) where parents
who perceived an erosion of the state education sector would select
private education for their children:

M1 – If we have someone, for example, who can't
relate to a community, then the community either
takes kiddies out of school or they just create
difficulties.
M2 – Well I think our expectations of principals are
now quite high and in a community like ours we
expect high educational standards and we want
someone who's got very strong leadership in terms of
education. So that's important. You want someone
who's got vision for education. You want someone
who has demonstrated good management skills. You
want someone who can relate to a board, and that
can be difficult. And you want someone who's got very
strong skills in relating to a community and particularly in our case, a community of pretty well educated people who've got a choice in terms of the private schools and have got very high expectations of what they get out of that school. Now when you put all of those things together...

Int: - You want God.
F - We get him (Board chairs of large schools with women principals: Int.17, p. 9).

This dialogue is interesting for more than the fact that God is 'her' in this case. It illustrates the combination of both educational and market discourses, and the board chair's appreciation and understanding of the important aspects inherent in both. In the literature Clarke and Newman (1992 pp.19-20) observed headteachers 'becoming bilingual' or 'learning to talk management', but in this case it seems the business executive board chairs have some notion of being bilingual and have learnt to 'talk education'. They recognise the importance of principals having effective communication skills if they are going to convince their parent body that the school maintains its good reputation. The literature widely endorses women's prowess in the area of communication and interpersonal skills (Pitner 1981; Marshall 1984; Shakeshaft 1989; Court 1992; Ozga 1993; Still, Guerin et al. 1994; Court 1994b; Dunlap and Schmuck 1995), and clearly in these large schools the women principals impressed their board chairs with highly developed communication skills which they felt assured would enhance the school's reputation. The following quote from a woman principal reveals she is under no illusions about the board's expectations of her performance to forge a desirable reputation for the school, in their choice of her as principal:

Int: -- Did the board ever tell you why they appointed you?
F – Yes, they appointed me because I had intermediate background. I was known in the area because I very successfully ran [name of nearby school], and we’d got a stunning ERO report. So they felt that I would relate to the community. I lived in the community and I had a high profile, and they felt that this school needed a higher profile than it currently had. One of the reasons for my appointment was to put this school on the map. They felt that I would be the person that could do that (Woman principal of large school: int. 11, p. 8).

Not surprisingly, the women principals believed the reasons parents chose schools for their children were based on educational values such as reputations of exceptional teachers and improvements in learning. An overview analysis of their interviews (Interviews 9, 11, 16) revealed an emphasis on the use of educational discourses rather than market discourses, which brought into focus an interesting line of disjuncture between the boards’ visions for their schools and the women principals’ visions. This observation has also been made previously in the literature (Grace 1995; Hall 1996). Gewirtz et al. (1995) found that not all headteachers accepted the new role defined by marketised practices uncritically, or necessarily acted it out. Sachs and Blackmore (1998, p. 272) comment on the dissonance often found between the expectations of employers in the job description of the principalship, and the attributes of leadership deemed necessary by principals:

The former prioritises management, public relations, financial skills and strong leadership; the latter prioritises educational vision, people skills, compassion, trust, genuine love of the job, humility, respect and pride of others’ achievements, reciprocity, lifelong learning, collegiality and professionalism.
In this study the women principals had very high educational expectations for students as the central theme in their visions, which it appeared the board chairs, in 'becoming bilingual' and 'reading the market' had picked up on, as central to their marketing to parents.

Marketing in a Competitive Educational Environment

Competition and parental choice provide boards with constant worry about roll growth or decline as the market fluctuates with the fickleness of public perception about quality schools and programmes (Gewirtz et al. 1995) and the performance of students, teachers and principals. In both rural and urban areas where there is a choice of schools, boards can be profoundly influenced by the threat of these effects of the market. In the Smithfield project, Lauder and colleagues (1994) compared the effects of marketisation on four schools of different socio-economic and ethnic profiles and found schools with working-class families were destabilised and sent into a spiral of decline. Marketing the school for roll growth therefore, becomes a critical activity because all other factors - financial, staffing, resources, in fact the continued survival of the school in some cases, depend on the number of students at the school. Marketing the school has become a central effect of the market policies, often threatening to disrupt educational programmes. The discursive effect of competitive marketing around the employment of a principal, drives the need to appoint someone who has the entrepreneurial vision, the skills and energy to pursue marketing strategies, and the status or mana\textsuperscript{26} to attract and convince prospective parents. This was commented on by the principal advisors:

Adv: - A rural school I helped and a semi rural school appointment recently, both were about maintaining roll or increasing roll. They wanted somebody who was going to be able to protect their roll, promote the school, you know.
Int: - Marketing?
Adv: - Yes to a degree it was, yes, but I think more about having a good quality person in there who was going to attract or maintain the roll through that, but also being able to get out there and fight big brother down the road who's flogging [poaching] their kids sort thing, as they see it. Being a school not far out of the urban area (Principal Advisor: Int. 21, p. 14).

One effect of competitive marketing known as 'poaching', where the board allocates part of the budget to run buses to other parts of town or country to pick up children from other school zones, has been particularly damaging for some schools. It has become acceptable practice in the new environment however, because all is considered fair game in the market. In his research on small schools, Collins (2003) found the practice much more widespread than is commonly thought with a large number of principals, spurred on by boards, engaging in the practice. In educational discourse this practice is considered reprehensible and goes against the collaborative ethos of education as a greater public good. This is an example where the discursive effects of market discourse has eclipsed the former educational discourse in a remarkably short time-frame, and where highly regarded principals are compromised by boards who are threatened by fears of school closure and who resort to survival tactics.

The market as previously mentioned is not however a 'free market' in the real sense (Chubb and Moe 1992), as the Ministry controls expansion and closure of schools. This sometimes created problems for boards at schools that were considered 'quality' or highly desirable schools as they were not free to decide to increase their roll, even when there was a demand from the parent body to do so. The Ministry determines the budget for new school buildings and thus maintains control. In the following case the school was located in a desirable area with a demand from parents to enrol their children, but the Ministry would not provide more money in the operations grant for more buildings, so the board
needed to discourage roll growth. The board were not unhappy about this situation, in fact there was an element of elitism implied in the board chair's remark:

F – We do market the school, but it wasn’t a priority for us because we were actually looking at capping the roll. It wasn’t a priority (Board chair of large decile 10 school with male principal: Int. 22, p. 17).

(a) Image Marketing

Another negative discursive effect of the market discourse is related to the somewhat superficial notion of image marketing, where schools have taken on promotional activities such as upgrading physical aspects including the appearance of a school and its pupils' uniforms, in an effort to attract students to the school. Since the beginning of the reforms in Britain, millions of dollars have been prioritised to a process of 'glossification' (Gewirtz et al. 1995, p. 127) involving upgrading the exteriors of school’s paintwork and grounds, the principal’s office and administration areas which act as the public front-piece of the school and which often resemble an 'open-plan building society office'. This has frequently been at the expense of overdue upgrades to teaching blocks, new equipment and resources. Similar ‘glossification’ and image upgrades have occurred in New Zealand schools over the last ten years. One board chair described the purpose of their image marketing:

M – Making the place more attractive, because it's out of town just a wee bit, we're trying to make it look more upmarket and attract more people to the school. It has got a good name and ever since we started the bus run to this school...we've got more coming to the school. It's a word of mouth thing...people will see that it is a good school. Being well maintained and run
Collins (2003) found in his small school study in New Zealand that for many boards the survival of the school by marketing to keep the roll viable was one of their main priorities. Gewirtz et al. (1995, p. 124) too, claim ‘responding to the market is for many schools now a question of survival’, and that managing their image is now creating ‘new semiologies of schooling’ (1995, p. 127) including glossification and a focus on ‘visual images and explicit indicators of quality’. Raising the public profile of a school by appealing to ‘explicit indicators of quality’, was referred to in the research (see in particular the case study of “Enterprise School” at the end of this chapter for examples of this). While boards involved in image marketing often adopted the discourse of Total Quality Management (TQM), this discourse was rarely used by the women principals. In the following quote two women use an educational discourse instead to raise the profile of their schools:

F1 - The school I’m in now has had people who have been prepared to just plod. That’s certainly not my agenda. I’m not there for that. I’m there to raise the profile and get things happening for kids.

F2 - When I went in first of all into the classroom I was quite surprised at what I found. So I spent a whole term just setting the tone for what I wanted and expected, and I called in every parent with their child and we talked about the testing and what I’d found out. I just said that my expectations were much higher and I expected this. I knew the children were capable of doing that and most parents I think were surprised by my honesty and thinking that everything was O.K. when I was saying, “well I think it could be much better”. I had one or two parents challenge me and say, “Well how come everything was O.K. until you
came, what are you saying?" I just gave the good professional answer and said, "Well it would be unprofessional of me to make a comment as to what I really think, but this is what I'm showing you and we need to work from here and I expect this and I am not going to lower my expectations of these children just because I'm in a different area and these children come from different backgrounds". By the second lot of interviews the parents were going "Thank God". You know it was structures, it was programmes, it was routines, it was homework, it was expectation.

F1 - Expectation, I would second that. My professional line to anyone who's questioned "how come you've discovered we've got a reading deficiency that needed to be addressed?" And it needed to be addressed straight away. But as I've said to the board and to parents, "It's really easy for me with fresh eyes to see it".

F2 - Yep that's exactly right (Women principals of small schools: Int. 6, pp. 12-13).

Both women had followed male principals into their schools who they believed had not had high educational expectations of their students. They were concerned about the low educational achievement levels that had been established, and accepted as normal by parents. For them, creating a profile of the school that centred around high educational standards was a priority, first and foremost as an educational prerogative and moral responsibility to their students, and secondly as a marketing tool. Their comments above reflected educational and professional discourses rather than marketing discourse as they discussed the image they were promoting.

This example illustrates the silencing, or at least side-lining of professional educational discourses in the marketised environment, to which Bacchi
(1999) draws our attention. Of the policy discourses evident in the restructuring reforms, professional educational and social democratic discourses overlap with, but remain less noticeable than, the dominant neo-liberal market managerial discourse (Court, 2004). While the former discourses are not totally silenced, they are diminished in value, not taken so seriously and not given the same airspace as the latter. However, the women principals in my study did take these discourses seriously and believed parents also did. Their use of professional educational discourse illustrates their rejection of the pure market discourse, but their taking up, interpreting and adapting the professional discourse redefines how this is useful to the market. In other words, they saw quality education or high educational achievement on the part of students as providing the marketing tool that would give their school the competitive edge.

(b) Niche Marketing

As a way of promoting and marketing schools some boards and principals focused on particular programmes or initiatives as ways of making their schools attractive to particular parental and student groups. This niche marketing appeared to be gaining momentum in some areas. Some appointment decisions were also prompted as a result of the needs associated with niche marketing. In one case a school set up a special immersion Maori language programme to attract Maori students. Appointing a principal who had the specialist knowledge and skills and who would promote this programme was a high priority for the board:

Int: - Can you remember the board in this process, before they even probably advertised, talking about what sort of person they were looking for, for the needs of the school?
F - It always had to be someone that was completely bilingual with the Maori language. I think we decided quite early on that that was essential, that the person
could speak Te Reo, the lingo, and could work well with the unit, the Maori immersion unit. That's all. Because it's just growing and growing, that unit. We got an amazing ERO report, so we've got a few more kids through that.

Int: - Was it publicly written up in the papers or anything?
F - No - but I think a lot of the people who send their kids here do investigate schools. They go to the ERO site\(^2\) and check out the local schools through that.

(\textit{Board chair of large school with woman principal: Int. 10, p. 7}).

Since the reforms, education generally has been conceptualised as simply another commodity for sale in the market place (Taylor 1997), but this example illustrates how 'difference' is commodified and becomes a marketable product. The board chair who was Pakeha appeared to have a stronger interest in the immersion unit as a marketable product than for reasons of commitment to biculturalism. Her derogatory use of the phrase 'the lingo' when referring to the Maori language, positioned her as competitively opportunistic, seizing the marketable advantage. The principal of the school, on the other hand, was a Maori woman whose over-riding concerns were for the educational and cultural wellbeing of Maori and Pacific children, and for whom the market, with a small 'm', is a tool to be used to retain the unique cultural diversity of the school:

F - Also we're trying to do things really differently here too in terms of partnership with Maori, and that's really hard, because it's working out a whole lot of policies and processes, but in a real strong sense about being real about the Treaty of Waitangi and what does that mean for that partnership. Not about saying, "Well this is what we're going to do, what do you think about that?" It's about saying, "Well what do we want to
achieve together collectively? What do you want to
achieve, how can we support that?" So it's quite
different. Being Maori and being principal and sitting
on two chairs has been hugely challenging and a lot
of conflict, but you have to go there to make a
difference (Woman principal of large school: Int. 10, p.
4).

Like the women principals in the previous example, there is a different
understanding of the market and use of the discourse. This Maori principal
has reinterpreted and co-opted the market discourse to further her cultural
and philosophic commitments, but the effects for her are difficult as a
consequence of 'sitting on two chairs'. She elaborated on the struggle the
school is having to maintain Maori culture in a part of the city that is
continually gentrifying along white middle-class lines:

F - This school has a very special and unique
class character. It's in the heart of central [city] that basically
is becoming more and a more yuppie middle class
pakeha environment. So to us it's really important that
we maintain our culture. So to do what needs to be
done is going to take a lot of work. So it's about
saying, "Right, how can we cater for the community to
retain our diversity?" It means that if we want to retain
that, then how do we attract Pacific Island people and
Maori people? Well we are doing that in terms of the
Maori immersion unit (Woman principal of large
school: Int. 9, p. 13).

The commodification of difference expressed here connects with the
'individualism' of the market discourse where diversity is channelled into
consumption and product forms (Marginson 1997). This board had in the
market discourse, established an exclusive reputation in a predominantly
white enclave of the city, for producing a product (an education

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programme delivered entirely in the Maori language), which had been marketed to a niche clientele of Maori and Pacific Islands people on the basis of their ethnic difference. The appointment of a principal who enhanced the reputation of the Maori immersion unit, guaranteed continued consumption of the product.

Reputation Goes Both Ways

Reputations about notions of quality are important in the marketisation of schools. Parents' perceptions of reputations of schools have seen many choose to remove their children from schools with 'poor' reputations, as previously discussed. However, there is another discursive effect of market reputations concerning boards' treatment of principals, which can have dramatic repercussions and which some boards are discovering to their peril. In a market environment, reputations go both ways and affect boards as much as principals and schools. A principal advisor described a potential crisis for a board's future reputation, saying, 'I think in one way, it's a big market, and in other ways it's a very small market, reputation-wise, in terms of the professionals knowing each other or thinking they do and thinking they know the reputations of the schools'.

The advisor described how a 'superb principal' in a high decile school was considering resigning after six months at the school because of difficulties with her board. She said, 'I went along to her board and said, "Be very careful because if she resigns, that message is going to go out around the education community like a rocket and a lot of good people will not want to be principal at your school"' (Principal Advisor: Int. 8, p. 5).

This illustrates the effects of struggling power relations emerging between two contradictory discourses. In the market discourse power resides chiefly with the board as the employer, but in an educational and professional context, market norms do not always sit comfortably, and can be dislodged by the principal exposing the bullying unprofessional reputation of the board with an early and public resignation.
The competitive market forces which produced the discursive effects that were played out in the large school focus-groups, illustrated the 'local logics' used to determine the choice of principal. In a large cosmopolitan city, the boards who adhered to principles of competition, market choice, parental choice, competitive marketing, niche and image marketing, and who were most concerned about their school's reputation, had all appointed women principals.

2. The Impact of Finances on Appointments

The second area where the discursive effects of the market significantly impacted on appointment practices with the market-oriented boards, was around financial matters. Business principles have been applied to educational administration since the restructuring of educational institutions and this has been well documented in the literature (Gewirtz 1995; Deem 1994; Lauder 1994; Taylor 1997; Wylie 1997a). Most boards have increasingly needed expert advice and have drawn on business practices to improve their financial situation and capabilities. The boards from the large city schools who regarded control over finances, budgets, markets and resources as integral and essential to good business management, used financial incentives to attract quality principals. However, they experienced problems after the abolition of bulk-funding, when they found they were working in a quasi-market situation and no longer able to financially lure applicants.

Financial Management after the Demise of Bulk-Funding

One of the intentions of the restructuring reforms was to devolve total financial management to boards of trustees in the spirit of public choice theory, which endorsed minimising the role of the state and lessening the inefficiencies of bureaucracy in preference for a devolutionary model which supported 'self-managing schools' (Olssen et al. 2004). However,
this has never fully eventuated. Since 1989, schools have been responsible for administering the Ministry-funded operations grant which allowed them to be self-managing in every way except for the payment of teachers salaries. These have continued to be paid centrally except for the early years after 1989 when boards could voluntarily opt into the scheme known as bulk-funding, which was a funding system based on schools being funded on a per capita pupil basis. This scheme was made optional for boards to take up if they wished to, whereby the Ministry fully-funded the school and devolved responsibility to the board to pay all staff. However, it was not a success, partly because of resistance to the scheme by teachers and unions worried about the potential cutback of salaries over time and the concern that boards may employ untrained teachers (Jesson 1999). The National Government, intent on furthering the new right market agenda, introduced financial incentives to induce boards to take up bulk-funding, and some boards with the financial skills to manage this, did take up the offer. Several of the boards in my large schools focus-group were in this category:

M4 – But bulk-funding did change that because under bulk-funding you actually ran it (the school) as a business. You could actually make cash decisions (Board chairs of large schools with women principals: Int. 17, p. 17).

Teacher resistance to bulk-funding grew during the 1990s (Fiske and Ladd 2000), and in 2000 with the newly elected Labour Government, the Minister of Education abolished bulk-funding (Government 2000). The boards in the focus-group who had been bulk-funded were highly critical of this move because it ‘tied their hands’ and prevented them from working in the pure business model. This policy shift was confusing and frustrating for them because they were struggling to make sense of and work within a market discourse that had been re-viewed and rewritten with new rules.

As Jayne (2004, p. 28) states, ‘while schools may be answerable for the
product they deliver, they can’t effectively change it (at least in the state system) because they are really only a franchisee’.

The implications for the appointment of principals to these schools was that boards were no longer able to use financial incentives and enticing individual contracts to attract suitable candidates, and therefore no longer able to guarantee ‘purchasing’ what they wanted. In other words they had lost one of their crucial power ploys by not being able to have some control over the market:

M - I also think that as a decile nine school with probably a really good track record of stroppy parents, in the post bulk-funded era, it’s [the principalship] a singularly unattractive proposition. They are not well rewarded for the grief they do endure from the community at times, and the board has no real ability to reward them. The rules have changed in terms of finance. So all of a sudden the situation we had a couple of years ago where you could actually have incentive plans in place and get the right people, you can’t do it any longer (Board chair of large school with woman principal: Int.17, p. 9).

These board chairs were clearly influenced by agency theory (Boston et al. 1996) in their thinking around matters of employment relations, invoking incentive structures and remuneration packages to attract and retain competitively performing principals. Without these economic strategies at their disposal after the end of bulk-funding, they were reduced to a more level playing field in which they had no faith, and of which they assumed principals would want no part:

M - So why would a principal come to a place with huge expectation and the most challenging funding
environment ever, especially in decile nine and ten and up? (Board chair of large school with woman principal: Int.17, p. 9).

These quotes provide clues as to why there were so few serious male applications to these jobs. Perhaps these jobs in high decile schools with 'stroppy parents' fit into the category of 'difficult principalships' which the men don't want, just as in the case of the teaching principalship (Wylie 1998).

The second intervention to the bulk-funding reforms was the decision by the Labour Minister of Education Trevor Mallard, in the 2000 Education Amendment Act, to redistribute the money saved from the abolition of bulk-funding, to assist schools who were struggling financially, many of whom were low-decile schools in low socio-economic communities:

The option to receive bulk funding will be removed, with the result that all schools will benefit from additional funding and have some of the flexibility in funds that only bulk funded schools have enjoyed (Government 2000, p.1).

Principals' salaries were increased in these schools as a result, to attract applicants to these 'difficult' schools. This was an example of the redistribution model or TFEA scheme, which was equity funding for low decile schools targeting funding for educational achievement (Fiske and Ladd 2000). This intervention highlights the policy shift and pull-back from the business model which had created winner and loser schools (Gordon 1994), to one in which a 'Robin Hood' type of equity discourse of taking from the rich to help the poor was established. This created an employment problem now for the high-decile schools:

M1 – They're asking people who are coming to a decile ten school, particularly just after bulk-funding, to
take a drop in salary. We’ve looked at a way of getting around that, but how do you say to someone who’s coming from a decile three or a decile four school that we are going to appoint you, and you are going to lose two thousand dollars immediately? (Board chair of large school with woman principal: Int.17, p. 10).

Each of the other board chairs agreed that the effects of losing bulk-funding was ‘totally horrific’:

M1 – We’re not just talking about the salary of that person either. What we found post bulk-funding, was the support structures that were in place for staff in general had to go, and the way we managed bulk-funding to actually generate people resources within the school, has disappeared.

M2 – It was worth $95,000.00 a year to us and that all went into teaching resources in the way of either bonuses, teacher aides or whatever. It went back into the kids, so we’ve lost that (Board chairs of large schools with women principals: Int. 17, p. 11).

As the board chairs discussed the negative implications of the loss of bulk-funding, they were able to shift between market and educational discourses and integrate these together in the ‘bilingual’ manner described earlier. They spent the additional money on educational and people resources, recognising the educational significance of these, but also recognising their advantaged market position by being able to purchase these things.

The main problem these board chairs were concerned with however, since the end of bulk-funding, was their ability to attract a high-flying principal without having the funds to do so, and a high salary was pivotal in this. They commented on the nature of the job of the principal and the huge
responsibility involved, the likes of which are not seen in the business world for the kinds of remuneration the principal gets:

M2 — I think the only people on my staff [in private enterprise] who would earn less than a principal are the admin staff. I have to say my P.A. would earn more than the senior teacher of the school. So to give someone what $75–80,000.00 to do that job isn’t very attractive at all.

F1 — When you load up the responsibility and the hours on top of what you get, it just doesn’t look great.

M1 — There's a lot of demand on principals by the community these days, particularly in our area. Very demanding parents.

M3 — A principal in our area would be one of the lower income earners and would probably have real difficulty with affording to live in this community.

F2 — I agree (Board chairs of large schools with women principals: Int. 17, p. 13).

The board chairs from these high-status, large, urban schools were themselves from the business world and were under no illusions about the responsibilities of a principal compared to those of a business executive. Jayne (2004, p. 29), writing for a New Zealand management journal, also commented:

Compare managing a business with managing a school, and the former looks like a bit of a doddle. The financial rewards are worlds apart yet the social responsibilities of both roles are in most respects comparable. Principals must provide strong professional leadership at school and also be the institution’s public face, juggling the needs of students
and staff with the high but often contrary expectations of parents and community. Principals are not divorced from the real world. They are on the frontline, daily dealing with socio-economic fallout realities including racial issues, dysfunctional families, financial hardship, poor nutrition or child abuse.

The low salary for the high level of responsibility and long hours appeared to be a barrier to some women in their decision not to become principals, especially when they realised private enterprise was paying well for work with much less responsibility:

F1 - But there's another group of women though who see the difference in salary between a principal and a DP and think...
F2 - Look at $5000.00 and said well...
F1 - "Why would I bother"?
F3 - I could go down and work at New World. $60,000 to be the manager of the bakery.
F4 - Is that right?
F3 - [My board chair] and I were there today and he told me that that is what his managers earn in a supermarket with no qualifications. You don’t go to meetings, you don’t do any assessment, and you work hard.
F1 - Do you have to bake?
F3 - No, you manage your bakers.
F1 - Oh you just manage it?
F3 - You buy the flour and sultanas. You watch them cook and you sniff – and that’s it! (Women principals from large schools: Int. 16, p. 61).
The situation salary-wise offers even less incentive in small schools. The women principals from small schools spoke about the drop in salary they had sacrificed for longer hours and more responsibility since giving up senior management jobs in large schools, where they had several management units \(^3\) attached to their position. They also spoke of how luxurious it would be to have their own office, a secretary and caretaker as of right, senior staff to delegate to, and not to have a full-time class to worry about or plan for. One woman said: 'This sounds terrible but it must be a walk in the park to be a walking principal' (Woman principal of small school: Int. 6, p. 36). A walking principal manages and does not teach.

The long hours involved in the job of the principalship were commented on by all the principals in the study. Most of the women worked around seventy hours per week with at least two or three meetings at night, and many worked at least part of their weekends. One of the women from a large school with a market driven board chair commented as though it was the norm, 'everyone works hard, everyone in business works long hours' (Int. 16, p. 64). Both Ozga (1993) and Ouston (1993) agree that work overload and long hours are regarded as the norm in the principalship. Livingstone (1999) in New Zealand, and d’Arbon (2004) in Australia have also found principals have worked longer hours since the reforms, than they did before.

When bulk-funding was available to these boards they were able to operate their schools as businesses in a commercial manner, but even then they were tightly constrained and controlled by central government. In Olssen and colleagues’ (2004, p. 178) critique of the New Zealand reforms they state that ‘the state would steer but not row...and it would continue to control and direct from afar, but it would not regulate in the traditional ‘bureaucratic’ sense’. The Ministry continued to determine the amount each school was eligible for in terms of the operations grant, and the timing of the release of this information to schools was also controlled by the Ministry. Budgeting for the year ahead becomes a problem if this
information is not released early enough, and for those boards working in the business model, this inefficiency became a source of frustration:

M - See the other aspect of that is, that everything is still dependent on the Ministry and the Ministry don't exactly work in an efficient manner. We just have to consider the budgeting now that we have to do. We start our budgeting for the future year, relatively early, but the last thing we do is to plug into that, what our income is going to be, because we get it at such a late stage from the Ministry. So they are expecting principals and schools to perform in a commercial manner, but they don't actually give the resources to perform that action (Board chair of large school with woman principal: Int. 17, p. 15).

The effect of a quasi-market model, is that boards and principals are held accountable for devolved responsibilities, but are hampered by financial restraints and a lack of autonomy and trust.

Financial Entrepreneurial Initiatives

One of the attractions of bulk-funding for these schools had been the possibility it opened up of expanding into entrepreneurial commercial and business practices. One of the schools in the focus-group had previously undertaken a business venture by setting up a private enterprise community learning-centre, which still continued in post bulk-funding days. It even now gave the school a competitive edge from its profit-making, in that it enabled them to employ an executive officer to lighten the principal's workload:

M1 - We offered in our package, a bonus to our principal, to get the right person, in the way of a
This example immediately gripped the attention of the other board chairs, and an interrogation of M1 went on for several more minutes as further information was sought on his profitable business enterprise, which offered the financial flexibility that the demise of bulk-funding had taken away.

M2 – So when did you do that?
M1 – Just two months ago. And we’re fortunate in as much as we do have a profitable community learning-centre which we are able to use some of those funds to reward top staff, and we still have that freedom within the way that we can operate our structure, and we needed we felt, to offer that, to pick the right people.
M2 – How is the Ministry with that one?
M1 – Yes we can do that because they are part of our community area. It’s a private enterprise completely and we’re able to offer that. We can’t do it within the Ministry scenario at all (Board chairs of large schools with women principals; Int. 17, p. 12).

The interest and excitement generated from this entrepreneurial initiative, as the other chairs wrestled with the possibility of similar schemes operating in their schools, illustrated the extent to which they took on the financial responsibilities of the school. In many ways it is not surprising, considering that financial management is where their expertise lies as business executives. Their women principals on the other hand, did not speak about financial management in their focus group, which could be because they handed over this responsibility to their board chairs. This possibility would certainly fit with Grace’s (1995, p. 136) findings of British
headteachers, who 'rejected conceptions of the school as a firm or business and conceptions of school leaders as market executives or entrepreneurs'.

Financial Management Skills

One of the perceived barriers to women gaining leadership positions cited in the literature (Deem 1989; Deem et al. 1995), is the belief that women lack financial management skills or the ability to make financial decisions. One might have expected this to have been raised as an issue with these boards favouring the market discourse, but it wasn't, because perhaps the board had taken on this responsibility. One of the principal advisors had another view, which could also explain the lack of concern by the board chairs:

F – I'm not sure that any educational people have skills in those areas [financial management]. That includes men. So they're [the boards] looking for evidence or proof that you can manage the books. Whereas often people who apply for principals' jobs manage the departmental budget or whatever, but they haven't managed any books. So the people who are getting on to short-lists here in [this city] probably have a M.Ed. Admin. or a Masters with finance papers or management papers or whatever. Now a board will often take that as proof that they can do it, whereas I don't think it's any evidence that they can do it at all. Certainly evidence that they've studied...but that doesn't make a good person into a financial manager necessarily

(Principal Advisor: Int. 8, p. 3).
It is common practice for larger schools, and all secondary schools, to employ an executive officer to manage the finances of the school. Many larger primary schools are now following suit, or they co-opt an accountant or business person on to their boards. Because of this, a principal with an understanding of financial matters, as this advisor says, is all that is required. So the position of women as leaders of these schools seems, in this situation, not to be undermined by the traditional market/managerialist argument that women won’t make good principals because they are not seen to be financially capable.

Overall, the boards in the study who were most influenced by the market discourse and who aimed to operate most closely to the market model, wanted full control of their own finances and budgets, wanted the freedom to develop entrepreneurial initiatives, and wanted to offer incentive packages to attract the best principal applicants in the field (market). They were also the boards that had appointed women; not because they were expected to be expert financial managers, but for their educational expertise. These boards valued the women principals for their educational capability – not their financial capability, which they realised could be picked up by a board member.

3. Business Model Appointment Practices

The third main area where the market discourses informed boards from the large high status schools in decisions was in the area of appointment practices where various procedures were borrowed from the business-world. These included cocktail parties to meet the candidates, shoulder tapping, psychometric testing, using numeric systems to rank candidates, and employing consultants. These procedures derive from new managerialism which is central to the NZNPM model (Boston et al. 1996). The basis tenant is that the techniques and strategies of ‘management’ as a generic activity can be applied to both public and private business.
Some of the appointment practices encountered by the principal advisors in large cities were considered 'faddy' because they mimicked current business practices:

F – There's all sorts of odd business practices that become flavour of the month in [this city] like "let's have a cocktail party and invite the wives". We went through a phase where you got them all together for drinks or dinner.
Int: - All the short list?
F - Yeah, with their partners. So there are faddy things that happen from time to time and I challenge boards really hard on that (Principal Advisor: Int. 8, p. 13).

Clearly the advisor in this case saw the adoption of practices transferring from the business world as not always appropriate in the educational world. The gendered assumptions in this example where applicants are men and 'wives' are invited, also mirrors business stereotypes where male executives are expected to have wives available for entertaining at business functions, but who first need to be scrutinised for social acceptability.

The influence from business practices that impacted most noticeably on appointments, however, arose from the uncertainty factor of applicants, and the information disadvantage that boards are at in any selection process. Their attempts to reduce the risk of adverse selection stems directly from principal agency theory which favours a technocratic approach, such as the practices described in my study where psychometric testing and numeric ranking systems were used in selecting candidates. As one principal advisor explained:

F – I've worked with some boards who are very confident, like decile ten people who are CEO's in big
companies and think they know how to do everything, and they try and impose their business practices on the school. So when they make an appointment they've got these check-lists and they've got ratings scales and they add up the ratings scales (Principal Advisor: Int. 8, p. 7).

As the advisor goes on to suggest, the reductionist, technicist rationale informing this type of ranking exercise, which is consistent with market and managerialist thinking, is not an appropriate measure of a principal in an educational setting, where the variables that need to be taken into account of the person and the job cannot be reduced purely to numbers.

F – Now my experience of that is, often it ends up getting someone you don’t want, because it’s very rare that those things are weighted in terms of what’s important. So you end up with a list of things and you add them up and you deem them to be equally important. Whereas in my view, some are a lot more important than others (Principal Advisor: Int. 8, p. 7).

Equally pseudo-scientific is the practice of psychometric testing, which is a commonly used testing procedure in the business world. One board chair related how he had incorporated this procedure into their selection process for a principal:

M – In the job I run, we use a consultant for our own business recruitment, who does the thirty-five minute brain scan in front of the computer thing, with eighty or ninety odd questions. He mentioned that he constructed a similar model for a private school to use. We used that model to select the final level of people in our principal appointment. Now this
computer generated one, as a rule we've found in business to be actually stunningly reliable.

Int: - Is that a personality test kind of thing?
M - Yes, it's a psyche profile (Board chair of large school with woman principal: Int.17, p. 29).

Psychometric measurement, which was developed after the second World War by industrial psychologists, refined and standardised selection testing. These procedures have contributed to examining the individual as 'object' (Townley 1994, p. 87), and has allowed the individual to be 'observed, identified, “known” and ultimately managed. Personality thus became inscribable and quantifiable, and the basis for management and administration' (1994, p. 89). It is from this psycho-scientific standpoint that the board chair argues the test is ‘stunningly reliable’.

Another selection practice which is widely used in business circles and which is presumptive on the individual being ‘known’, as Townley (1994) argues, is shoulder-tapping. This was approved of and adopted by the group of market-oriented board chairs:

F - We did. You go out in business and you go and tap somebody and, “Come and work for me” (Board chair of large school with woman principal: Int.17, p. 32).

All three practices of numeric ranking, psychometric testing and shoulder tapping are strategies designed to reduce the risk of an adverse selection where the information about an agent (in this case the principal applicant) is difficult to observe, and where the applicant’s ability and character may be unknown to the employer. The principles of agency theory, using Bacchi’s ‘what is the problem’ approach (1999), assume the self-interest of principals will conspire to deceive the board with untrustworthy responses in a pre-contract employment situation, hence the need to use such tactics. The shoulder tapping strategy is the option which entails the least
amount of risk as presumably the employer already does know certain information about the person.

Another business practice associated with the risk of adverse selection used frequently by these boards, was purchasing the services of consultants to help with appointments, because the board chairs readily admitted they didn't have the expertise to assess what a good principal should have. The technicist language of two of the board chairs (M1 and M2 in the following quote) exemplifies the market discourse:

M1 – We recognised that we didn't have any formal way of measuring what a good principal is going to be, so what on earth are we looking for technically and therefore we resorted to using a third party as a consultant.

M2 – I think from that perspective a consultant is a valuable tool, who has local knowledge of people who are applying, or if they don't know them, they would certainly be able to find out something about them, and they are happy to tell you. Just from that alone, we ruled out a lot of people who otherwise we would have gone to the trouble of possibly interviewing a stage further.

M4 – We have people indeed who looked like they were going to scrub up pretty well and our consultant just sort of said, "No you are not going to even talk to that person" (Board chairs of large schools with woman principals: Int.17, p. 20).

The expenses of consultancy, while large, were considered worthwhile by these boards. In this respect they adhered to the business ethic of paying for a service that they recognised required the kinds of knowledge and expertise they did not have:
F1 - We were astounded actually how much the whole process cost at the end of the day. It was big. About $2000.

F2 - The most important decision any one board can actually make, is getting the right person into that job, and so we believe that that was money well spent.

F1 - We are lay people and how are we to actually assess the quality of this? (Board chairs of large school with woman principals: Int. 17, p.21-22).

The accountability function of a board's role looms large with these market-oriented boards. They were prepared to pay for a consultant to help them with this responsibility. According to agency theory, efficiencies will result from a division of labour based on specialisation, where the employer may lack the skills, expertise or specialised knowledge to perform a task (Boston et al. 1996). These board chairs regarded expertise highly, and while they were also wary of the implications of 'provider capture' and the need for 'independent' experts, they still were more aware than some of the board chairs from smaller schools, of their own lack of expertise in educational matters, and respectful of the need for informed assistance in these matters. In this sense their immersion in the world of business did give them an appreciation of the complexity of the nature of the principalship, in a way that was missing from some of the more rural boards.

One of the most disturbing business practices to counteract adverse selection was reported by the women principals from large schools. It entailed asking the applicants to sign a statement giving them access to informants other than the candidate's chosen referees to check up on their educational background. The woman applicants did not consider this necessary, but said if they refused, the board would have presumed they had something to hide. They reported how the board had abused this privilege by ringing people and asking personal questions:
They actually rang somebody I know who was overseas, to ask them how old I was. I know there were four people who were contacted, who were not referees.

One of them was asked about my dress: "do I always wear such nice clothes to school because they didn't think that was appropriate". They were questions nothing to do with the position, or my ability. Nothing to do with education. And the other thing they did which I thought was absolutely horrendous was they rang one of the other applicant's referees and said, "'Marcia' has applied for this job, how do you think your person will feel about that?" (Women principal of large school: Int. 16, p. 45).

4. The Masculinist Market Culture

Finally, market discourses were closely linked to particular discourses of masculinity. This masculinist culture, according to the women principals appointed by boards in the study, was profound. The discursive practices embedded in organisational cultures that are market oriented often produce versions of masculinity that resist or exclude the leadership of women (Blackmore 1993b; Itzin and Newman 1995; Alvesson and Due Billing 1997; Sinclair 1998). The women principals spoke about the costs to them of this masculinist hegemonic culture that pervades all aspects of educational leadership, creating a hostile climate for women (Court 1994b), and proving very difficult to change.

Masculinist Identity and Principalship

Women practitioners raised concerns about the sexist advice being given to boards by some of the principal advisors or consultants whom they
considered were part of the 'old boy's network', and who were intent on retaining the status quo in the representation of the principalship:

F1 - Think around, who's out there that's a male?
F2 - In the consulting field? A few of them that shouldn't be.
F3 - And the other one is the male principal (advisor) supporting the board. Females do not trust them because they appoint the males on board after board, and so someone like one of our female principals actually applied for four jobs and wondered why she wasn't getting them. It was the same male advisor on each board, basically (Women principals of large schools: Int. 16, p. 29).

Cloning in recruitment is widely discussed in the literature (Apelt 1995; Kanter 1997), as a way of retaining the glass ceiling (King 1993; Hall 1996; Still 1995), which appeared to be the intention described here.

Examples of a pervasive masculinised culture were reported by the women principals as experienced at principal associations, leadership conferences, Ministry of Education seminars, and informal principal get-togethers:

F1 - The other thing is the NZPF (New Zealand Principals' Federation) at the Christchurch conference last year.
F2 - Appalling.
F1 - It was male orientated. The speakers were anti-women, there was anti-blond humour.
F3 - Did anybody go to the Ministry thing about staffing?
F4 - Yes.
F3 - He put up a cartoon of a woman in these brief, brief bikini pants with a lawn mower cutting the pubic hair.

"Now that I've got a captive audience," he said. It was his first sentence.

F2 - How dare he! (Women principals of large schools: Int. 16. pp. 31-32).

The macho language (French in Itzin and Newman 1995) and 'locker room' sexist comments and jokes (Parkin and Maddock 1993) evident in these examples, some of which were from senior male officials including from the Ministry, illustrated the pervasiveness of particular forms of macho masculinity and resistance to women. In the following example there was not just resistance, but rejection of the place of women in leadership positions:

F4 - I went to a live-in thing at Sumner (for principals). We went into the lounge and four men from the deep South were watching the cricket, and the other woman said to them, "what's the score?" And they turned the T.V. off and said, "What the hell do you think you're doing in here? Go back to the kitchen"... anyway their next comment was, "Well, we are actually here to watch the rugby, there's no room for women in here. Make a cup of coffee and go back to your room like our women have done" (Women principals from large schools: Int. 16, p. 6).

The rejection and denial of the women's right to be there has been commented on previously in the literature by Sinclair (1998, p. 175), who argued for 'the need to deconstruct the traditional but obscured relationship between heroic masculinity and corporate leadership', which rejects 'the sentimental and feminine'.

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The women principals also spoke about a recent appointment at a prestigious boy's school which two of them had expressed interest in applying for. When they inquired, they were told by the recruiting consultant that although he was aware of their excellent reputations as principals, they were wasting their time:

F1 - He said - and he was very apologetic about it - "the board is actually looking for a man". I said, "Even though they've had several recently that weren't successful, so you mean to say they are still doing that?" He said, "Yes".

F2 - Because we cannot, as females, be role models.
F1 - But I said to him, "There are plenty of men in the school who take that role now. The previous headmaster didn't do any of that".
F2 - You do know that the anatomy makes a difference to the brain, don't you? (Laughter) (Women principals of large schools: Int. 16, p. 11).

While gendered analyses of leader/managers in education in recent literature have exposed a strong masculinist culture (Cockburn 1991; Collinson 1992; Parkin and Maddock 1993; Collinson and Hearn 2000), ethnic analyses of the principalship have been less well researched. However, the dominant image and racial identity of the principal in New Zealand remains white and European. In the following quote a Maori woman principal of some five year’s standing, questioned her identity as a 'real' principal, because of the pervasiveness of the image of the white male principal:

F - I had quite a strong feeling that it was the right place for me, but also - I mean part of the whole thing about being a principal was that it was so unreal for me. I'm not meant to be a principal; I know that, you know. You're not meant to be a principal if you're not
so and so, and so and so, and so and so. I know that’s changing, but the reality is that you still go into principals meetings and there’s all the men in shirts and ties and suits, a few women scattered here and there, even fewer Maori. The reality is that when you talk about the strongest most empowering thing, it’s role models. It’s very very hard to sit there. It’s like pinching yourself at times saying, “Yes I am a principal and the fact that I’m different and I come from where I’m from, is really exiting.” So holding on to that, rather than feeling – well I do feel outside, but not in a negative way. I think that I’ve got a lot to contribute, but it’s also at times intimidating. That doesn’t mean to say that I don’t say my piece at times (Woman principal from large school: Int. 9, p. 9).

To be Maori, a woman and a principal brought up conflicting and contradictory senses of identity and visibility for this woman, because of her sense of ‘outsider status’ (Tallerico, Poole and Burstyn 1994, in Gardiner et al. 2000), she felt in the role of principal (‘well, I do feel outside’). Al-Kaalifa (1989) observed similar issues of visibility for black senior women in an environment where women headteachers were scarce, and black ones even more so. In their feminist critique of mentoring, Gardiner, Enomoto and Grogan (2000, p. 169) note the way ‘women of color are often misrepresented for both their gender and their racial identification. These misrepresentations and mistaken identities can erode their sense of self and cause doubt in their abilities and competencies’. These same doubts threatened to erode the emotional sense of competence the Maori woman principal felt, even though on a rational level she knew they were unfounded.
Board Leadership, Markets and Masculinity

This masculinised market culture in education was also reflected in the gender composition of the chairs of these market driven boards. Six of the nine chairs in the focus-group were men. This differed from the national pattern, where since 2001, 51 percent of boards had women chairs (NZSTA personal communication). The position of board chair in these high decile schools appeared to attract status and power. The women principals concluded it seemed to be regarded as a privileged position where these leaders of business offered their skills and expertise, and ‘did their community service’ in an altruistic, but paternalistic way:

F1 - But what I hear is, they socialise amongst themselves a lot with other board members from other schools because of where they live in this area, and it's more, "Well I'm the chair of this board. What are you"? And it's a status thing.
F2 - The board chair is quite a status in the community.
F3 - Absolutely.
F4 - It's quite a status. It’s almost like your community service before you get your ‘Sir’... It's your voluntary work.
F2 - A previous member of our board who is no longer on our board was absolutely desperate to be chairperson. When he wasn't, he looked at the guy who got to be chair person and he said, "Oh well, now you're king aren't you? You've just been crowned".
F1 - And I think what it comes down to is the appraisal of the principal too. They have some power (Women principals of large schools: Int. 16, p. 57).
The masculinist culture of these market-oriented boards was commented on by the women principals. They provided examples of some male board chairs' behaviour in their interview experiences:

F1 - I guess it could have been seen as quite threatening really because I was sat right out in the middle, quite a long way from a half circle of people who didn't have any desks or anything. So they sat there and sort of lent back on their chairs every now and then, and looked. You know, with their hands behind their heads and their legs out, that sort of thing... That wasn't really appropriate interview practice when you think about it and I sat there with nothing to put my things on - you know, you didn't know whether to cross your legs, put your legs down, because there was no table - I mean it's hard for a woman to sit there like that...that sort of horrible thing.

F2 - I think that men don't think - because a man co-ordinated the one that I've just got, two men did because one was the chair and one was the consultant, and they don't think ahead of things like, they had - like yours, they had my seat here, and their's were all around there and they had a coffee table, and they put my water on the coffee table. So for me to have a drink I had to put my stuff down, stand up, take three steps, drink it there and come back again, or pick it up, and shaking, sit down. I thought well I'm not going to have a glass of water. Now if you were a woman, seriously, you would think of all those little strategies and nuances.

F3 - And you would probably be sitting around a table so at least you can put your legs under and you can relax.
F2 - It's almost as if it's designed to be threatening though:
(Women principals of large schools: Int. 16, p. 49-50).

These practices in interview panels signalled threat and physical dominance (the leaning back with legs out and hands behind the heads, just looking), and non-thinking indifference (arrangement of seating, tables, and water glasses). Both represent power and assertiveness and are noted in the literature as off-putting to women (Chapman 1990; Bloomberg 1991). They also demonstrate the resistance towards women that such a masculinised market culture epitomises, and the misogynist hostility observed by Itzin (1995) in the gender culture of organisations.

Women's Ways in a Masculinist Culture

Unsurprisingly, the masculinist culture was not evident in the women board chairs' comments. Where women chairs led market-oriented boards there were different practices. The benefits of a market culture in their schools were appropriated for positive initiatives such as improving staff relations and educational experiences for students. An example of this occurred in the appraisal of a Maori woman principal, by her woman board chair, where the board supported the principal financially to reduce her stress levels:

F - My own expectations to make a difference for Maori kids are huge as well...and my health, health and welfare I suppose – the financial cost of doing this job is phenomenal. For the last four years I've had to have massages on a regular basis. Well they are not cheap. When you've got to go somewhere to talk and let go of stuff sometimes, that's $155.00 a session. I've talked with the board about, "Every now and again I'm going to have to go and get counselling support
for some of the stuff that happens here". I shouldn't have to pay for that. If I don't physically get rid of that stuff then it's going to affect me totally. I've just had my appraisal too, which was pretty neat. As a result of that the board gave me a letter saying to invoice them directly for my massages. I had already negotiated once with them that once a term I'd have one, but now what they are saying is, as I need it (Woman principal of large school: Int. 9, p. 14).

In this scenario, the elements of power between the board chair and principal were not evident. The two women involved collaborated co-operatively to resolve a problem and produced a positive result for both the school and the principal, in a way that is significantly different to the established male norm (Grogan 1996; Brunner 1999, 2000; Smulyan 2000).

Masculinised cultures of the market, when played out in school boards, position women principals in a 'chilly climate' at times (Apelt 1995). The women participants in the large schools' focus-group reported on occasions when they resented and resisted this culture. They did not always feel uncomfortable however, and sometimes felt entirely at ease and happy with their positions. Their board chairs clearly did value their expertise and allowed them to recreate their own cultures within the school. There was however, always a sense that they were the exception to the rule, which a male principal in all probability, would not have experienced. The following case study explores this masculinist culture in a market-oriented school, but where a male principal was appointed.

**CASE STUDY : 'ENTERPRISE SCHOOL'**

One of the case studies in the study clearly illustrated how market discourses are played out in the appointment of a principal. However, the chosen candidate was a man, and the case also illustrated the effects of
masculinist, market/corporate discourses being drawn on, which intertwined with discourses of gender and leadership as the board rationalised their particular 'local logics' in coming to a decision. Both market and gender discourses therefore, contributed to an analysis of the case study of 'Enterprise School'.

'Enterprise School' was situated on the outskirts of a large town and in the past it would have been considered a small country school. In the last ten years the stable farming community had changed in character as farms had been subdivided and sold as life-style blocks, and families from the town had moved out to enjoy 'hobby farming'. The community had become more diverse with more than half of the parents employed in businesses in town, while the rest continued to farm. However it remained a relatively wealthy white middle-class area. Only six percent of the children were Maori and there were no other ethnic groups attending the school. As the composition of the community had changed with more urban families, so too had the wishes of parents in the kind of education their children received. This became evident in the recent appointment of a new principal. The school was U2 with a roll of 150 students and it had a decile ten rating at the time of the resignation of the previous principal. The position advertised was for a teaching principal, and there were fifteen applicants to the position with less than half being from women. The shortlist comprised four men and one woman.

Five board members were involved in the selection panel. Three were corporate/business people and two were teachers. There were two men and three women who were interviewed separately in the study. The three business people all had recruitment skills and experience derived from their own workplaces so decided they did not need the assistance of a principal advisor:

M1 – “Charles” and myself are both in corporate environments, managing staff, recruiting staff...so both of us have had quite a lot of experience in this
area...“Trudi” is actually involved in a business in town, so again she’s got some experience in terms of recruiting and selecting and managing people (Int. 23, p. 6).

The staff representative on the board asked to be involved in the appointment as she was concerned that there needed to be someone from a primary educational background involved. The other board member was a teacher from the secondary sector.

**Market Discourses**

As they reported in the interviews, the panel appeared to have worked through most of the steps in the appointment process and had followed appropriate procedures. There was agreement that the staff and community were not formally consulted about what sort of principal was wanted, but informally and anecdotally this appeared to have happened in some cases, and the members of the panel had a reasonably consistent view about what they did and did not want. In short they wanted a change in leadership style and vision from the past principal, and they wanted someone who would ‘move the school on’. Their rationale was based on historical logics, where there was a perception that the past principal had suited a farming community, but no longer suited the present community. Four members of the panel expressed their views in the following ways:

**F1** — They really wanted a change from the style of leadership that they’d had. The school community had changed quite a lot from being very definitely a country school in values and attitudes, to a school that was much more oriented with the city. The previous principal was very much a good country principal. They wanted some technology and some flair to sort of perceive as progress (Int. 25. p. 3).
This board member had a very clear understanding of the history of the community, the shift in values as the community changed and a rather scathing view of ‘progress’ as defined by the market (‘they wanted some technology and some flare and sort of perceive it as progress’). In his analysis of what the board were looking for, the second board member drew on discourses of the market from a perspective more in favour of the market:

M2 – I guess, raise the profile of the school. Try and make it a bit more than just the cosy rural that it was seen to be... we decided that we needed somebody with a little bit of drive. We needed somebody with good administration skills...I think there was some feeling that the school was lacking in the physical environment, some sporting involvement...and I think there was a feeling that we wanted a little bit more strength in the principal.

Int: – Strength in the principal? What does that mean?

M2 – Well somebody who was going to lead. Someone who was going to create an environment where people actually wanted to put their heads up and say, “Yeah, look at us”, rather than just continuing to do a good job, which was what was happening previously (Int. 24, p. 3).

The language of the market was mobilised by this board member as he lists ‘corporate’ attributes of marketing (‘raising the profile’), competitive edge (someone with ‘drive’ who will create a ‘look-at-us’, smart, physical environment), managerial capability (‘good administrative skills’), and corporate leadership (‘strength in the principal’). This solid market image is positioned against the soft ‘cosy rural’ image of the past – implying progress, improvement and a certain future. His language was inflected by
gender through phrases such as ‘more strength in the principal’, and ‘somebody who was going to lead, create, drive, and do sport and administration’.

The third panel member was a teacher who drew upon both market and educational discourses in her response:

F2 - One thing that I felt quite strongly about...we knew the person had to fill the role of senior teacher. I felt it was actually very important that we had a good teacher. We were at the stage in the school where we needed a leader to help market the school. Someone who had the administrative and maybe charismatic qualities and strategic planning qualities to be able to attract pupils to the school. We were at the stage where we just hovering around an extra teacher mark (Int. 26, p. 2).

Sport, discipline and market image were linked with masculinity in the following discussion:

F3 - They wanted, what they perceived, as a strong discipline person. They felt that that would be a male. They definitely wanted marketing because the school was going through where the roll was a bit shaky and there was a possibility of losing a teacher. They are quite into sports and inter-school things, so that was a force as well.

Int: – So was curriculum mentioned?
F – Not a lot. Not initially (Int. 27, p. 6).

This was truly the embodiment of the principal/male manager, identified in the literature as masculine (Alvesson and Due Billing 1997; Sinclair 1998; Collinson and Hearn 1994).
Raising the profile of the school to be distinctive within the market was less about educational standards, as all agreed the past principal had left the school in 'good academic shape'. Rather, their vision of the school had been achieved by the new principal, as evident in the school's market successes:

M2 - He certainly has raised the profile of the school.
There have been a couple of newspaper articles, which previously would never have happened. The school sporting results have improved, so that's a plus. The educational aspect of the school hasn't changed too much, but then I guess, it was always reasonably good anyway (Int. 24, p. 12).

F2 – ...taking advantage of any sort of ways of putting the school out in terms of little art newspaper articles, a painting on the front of the school so that people could see what the school was about, designing a new uniform so that the kids looked smart. All those sorts of things (Int. 26, p. 6).

M1 – We had a vision that we were starting to see unfold to our great excitement...the passion, the enthusiasm, his experience...we are actually having to struggle with turning people away next year, which is always difficult, but it's comforting to see that it's a school of choice (Int. 23, p. 10).

F1 – They certainly got a very razzmatazz guy with great PR, superb PR...very confident, full of enthusiasm, full of gush...I find it a bit over the top, but other people find it great. They certainly have got I.T., and that was a big push. The thing that sums it up
is the change in school motto. The previous principal used the Maori motto “Kia kaha”, which is “Have strength”. Now the current motto, which is plastered all over the end of the prefab facing the road is “Attitude is everything” (Int. 25, p. 6).

F3 – I think he fits their profile really well...all those things like the enthusiasm, the energy, up there, out there, looking for what’s new, what’s good, what’s exciting, and he presents that. Definitely (Int. 27, p. 13).

For the board these promotional aspects were important in raising the profile of the school. Various promotional events such as newspaper articles, improved sporting results, introducing a new uniform, upgrading computer facilities and painting mottos and illustrations on the school buildings, while educationally superficial, were designed to focus local and media attention on the school. Or what Gewirtz et al. (1995) call ‘glossification’ and image marketing. Image management conjures up a slick, enthusiastic public relations discourse used by the principal, which appears to have sold the image effectively. His personal qualities also project the slick promotional advertiser of the market. He is described as having ‘the passion, the enthusiasm, being very confident, full of enthusiasm, very razzmatazz with superb PR’. He has ‘the energy, is up there, out there, looking for what’s new, good and exciting’.

Promotional events, Gewirtz et al. (1995, p. 128) comment, are ‘becoming slicker and are geared towards selling the school in a far more thrusting way than was previously the norm in schools’. Logos and other symbols are used to invent traditions to establish local reputations in the popular consciousness. Uniforms are often introduced to indicate ‘discipline’ is present at the school. All of these new semioologies of schooling they claim:
Resemble a simulated hyperreality...which appear to be only weakly associated with the actuality of school provision. The market is providing a far greater incentive than existed previously for schools to manipulate images rather than genuinely inform parents and children (1995, p. 136).

The board of "Enterprise School" appeared to be influenced by such market incentives in their decision of a principal, where manipulating images was seen to be more important than informing parents about genuine educational matters.

The Politics of Gender

When asked about gender, there were a range of responses from the panel members. One denied it was a stated criteria, but admitted a preference:

M1 — Well I think first and foremost, we were looking for the right person with the right skills and experience and background and vision in terms of leading the school forward. I think it was a nice bonus if it happened to be a male because we had a male principal previously. He was the only male teacher in the school and I think it is nice if you can actually have a mix of gender in terms of the staff of the school. But certainly it was not factored in our thinking in terms of the selection process (Int. 23, p. 2).

The stated criteria it appears, were about 'the right skills, experience, background and vision to lead the school forward', and even though these were not defined, they appeared to link with ideas about the market rather than education. Preference for a male is clear in this interview, for reasons of gender balance, even though it wasn't stated as a criteria. A second
panel member contradicted this interpretation however, and remembered that gender was discussed with the board:

F3 – I think they all had a really clear picture in their heads about what they wanted. They wanted a male. They said that quite specifically right from the start, from the very first meeting, it was going to be a male. I said at the time, “No, it will be the best person for the job” And they said, “And the best person for the job will be a male”. That was stated right from the start. That’s why I know how many people were short-listed, like there were four males and one female because that female was never ever going to get the job.

Int. - She just didn’t stack up?
F3 - She was only there because I had insisted – it was tokenism really to be honest. (int. 27, p. 3).

EEO discourse was called upon in this instance (‘the right person for the job’), but the board ignored EEO principles by excluding any serious contenders who were women. In the following quote, the preference for a male seems to have been strong also from the community in general:

F2 - I was a parent who was at the school every day, twice a day, so I did get a fair bit of community feedback from people speaking to me. People very much wanted to have that male role model influence, for the boys especially. Especially the older boys...I think it probably was for discipline reasons. I mean some of the women teachers have strong personalities. They were pretty strong disciplinarians as well, but I just think the role model thing in terms of knowing boys. Boys are different, and sometimes men – I don’t know if they understand boys better or what a woman might think is naughty, a man might
think, well it's not naughty, it's a boy. I think just encouraging them in the right directions in terms of the things that boys enjoy, and are good in, channelling them down those lines, rather than making them do the things that might be strict academic criteria.

Int: - And has there always been a tradition at this school where there had been a male principal?
F2 - I don't think there has ever been a female principal (Int. 26, pp. 3-4).

The heroic leadership discourse was drawn on in relation to discipline in this quote. At the same time, the board member recognised that the women teachers at the school were not deficient in this regard. But she ultimately referred to the populist role models for boys discourse with its implications of recuperative masculinities (Douglas and Lingard 1999) and notions of essential differences between boys and girls, and male and female teachers.

Another male board member demonstrated in his response the way 'local logics' works in the appointment process, where there is an implicit 'understanding' about certain preferences, which are not made explicit or discussed in an open forum:

Int: - And did you have any sense of what the school was looking for in terms of the gender of your principal at the time that you were at that appointment stage?
M2 - As a group I think the answer is no. Personally, yes, I have to admit that I had a feeling that I was looking for a reasonably strong, slightly sports oriented male.
Int: - Within a certain age group?
M2 - Yeah, on the younger side. Again, looking for somebody with a little bit of vigour and drive.
Int: - And was that ever made explicit in terms of your appointment panel? Did you sort of ask each other about that?

M2 - I spoke informally to one or two others on the panel, but certainly there was nothing specific about it. I guess as natural conversation, you tend to say to somebody who you know as a neighbour or a friend, "What do you think we actually want here?" I think it was fair to say that we were looking for a leader. There had been no male teachers in the school for a while anyway. This was at a time when a lot of noise was being made through the media about the lack of male teachers. I think that one or two of us felt, well it's not so much the lack of, we just need some male involvement in the school, and at that point we didn't have any. So I think that that was part of the thinking...so I guess this posed another opportunity to try and recruit some male influence into the school (Int. 24, pp. 5-6).

Masculinity was implicit in the use of words such as 'strong', 'younger', 'sports-oriented', 'vigour and drive' and 'leader'. The gender balance argument was cited again, but in this case male 'involvement and influence' were seen to be the requisite qualities, as something the school was lacking and that more masculinity was a positive. This raises the deficit theory that proposes schools which are composed of women staff are deficient in some way.

In the appointment of this male principal, these panel members reflected on their interpretations of the characteristics and qualities as to why this candidate was the preferred choice. In their discussion they drew on discourses of leadership which conflated masculinity and leadership as assumed and 'natural', and linked masculinity to corporate leadership (Blackmore 1993a; Hall 1996). Their understandings of what leadership
required drew upon masculinist discourses about discipline, sporting leadership, youth, vigour and drive, historical traditions of male principals, role models for the boys and balancing a feminised workforce. This was the logic at work within this local decision-making context.

The male who became principal of 'Enterprise School' appeared to win the position at interview stage, when he presented, with a certain amount of charisma, charm or 'X factor', the vision the board wanted to hear that talked about image and markets, with him being a good performer in such a context:

Int: - How did he come across compared to the others? Why did he stand out?
F2 - He's a very good communicator – quite a charismatic person, and a good speaker.
Int: - And did he stand out at the interview stage, or was......
F2 - He did stand out, but there were board members with reservations.
Int: - And what were they around?
F2 - Around, I guess, the fact that we didn't know that he'd been in the classroom. The other one is that some people felt that the charismatic side of the presentation was a bit slick. It was a bit hard to tell what was actually deliverable and what wasn't. What you say you can do and what you can do aren't necessarily the same (Int. 26, p. 8).

According to Collinson and Hearn (2000 p. 264), men are often associated with a type of management that is heroic where one charismatic leader drives initiatives, an observation which seems to fit this candidate. Slick presentation skills and the promoting and selling of self is another 'promotional event' (Gerwitz et al. 1995), which sits comfortably in market ideology and which this candidate also used to his advantage. Possibly, it
was no small coincidence that the male board member (M2), who was a business executive and most familiar with the 'ways of the market', was most suspicious about the authenticity of the self-promotion exercise:

M2 - My view is that once you’ve made an assessment that the applicant has the necessary skills and the necessary experience, the next key factors tend to be based on gut feel and personality, and are you going to be able to fit into this team. Are they going to work well as a unit? I think that that’s where the interview process becomes very important...I think I was probably the only one on the panel who had any gut worry. All the others were very confident...they were quite clear that he was the right person for the job. I personally had a little bit of a concern in my gut that maybe he was a touch too glib, and it’s always difficult to try and assess somebody’s glibness when they’ve got a lot of experience and tend to be able to back up what they are saying on paper (Int. 24, pp. 10-11).

The 'logic' operating in this 'confessional' statement was located within a deep knowledge and understanding of market practices (charades, partial truths, tricks) which this board member understood as a corporate business man himself. He instinctively recognised 'the game that is played' to sell yourself or your product, is untrustworthy. The mistrust implicit in agency theory (Boston et al. 1996) emerges as adverse selection because of the information disadvantage the board is at in terms of not knowing vital information about the applicant. The next panel member expressed a mistrust of process, based on the grounds of manipulated numerical rankings:
F3 - It was personal qualities. And interesting — because they did this point system and he didn't get the most points.
Int: - Didn't he?
F3 - No. Did not get the most points, but they all said it was gut response.
Int: - So in a sense the process was kind of put aside?
F3 - I think that when they looked at it they thought, "right". Then they went back and said, "Oh but we could have given him more here" or "We could have given him more there". So they used the system to make it work...I think that actually instinct and the way that you just relate makes a huge difference in terms of appointments. I just think it's really interesting going into a process like this where they already have a picture in their head of what they want, and that was very definitely here. It's hard to get them to look outside the box, I guess (Int. 27, p. 12).

The 'gut reactions' referred to in several of these interviews highlighted the unknowable factors that influenced and tipped the balance in decisions around the best person for the job, that dominated many of the appointments in this study. Personal qualities that were not prioritised in criteria or person specifications prior to the interview, but which were 'jigged' or manipulated to count in point system procedures, as in the above case, held considerable significance.

The case of 'Enterprise School' illustrated how market policies are adopted and interpreted as the board struggled with historical and future perceptions of what the school was and what it might become. The shaking off of an image which served the former conservative farming community with traditions centred around educational values, to one which was perceived to serve the present and future more fluid, open-ended, urban-plus-rural community, with practices representing a competitive
culture, drove the appointment of a principal who was seen to represent these market values.

"Enterprise School" case study mirrors what Gewirtz et al. (1995, p. 110) found in their case study of 'Trumpton', which they found highlighted,

Struggles over policies – the micropolitics of change – which ensue when policies are 're-created' or attempted within institutions. General legal frameworks and policy imperatives are inserted into idiosyncratic institutional settings by specific actors. They enter and interact with a particular history and a particular set of institutional conditions. As a result, policies need to be understood as much in terms of what is enacted as what is intended... The assertion of, and resistance to, policy is always hedged around with some degree of chaos/freedom.

This case study contradicts other findings in the literature (Glatter and Woods 1995; Grace 1995; Bell 1999), who found that marketing the school and competing in a market environment was not part of the ethos of most British primary heads. At 'Enterprise School' the principal was appointed for his 'vision' and marketing skills, rather than for his educational philosophy. Similarly the evidence in my study of corporate-styled boards also contradicts some past British literature. While the boards in my large school focus-groups had taken up the discourse of the market quite emphatically and espoused market values and ideology, particularly around the field of principal appointments, Bell (1999) and Deem et al. (1995) found many governing bodies reticent about managing primary schools as if they were in a free market or even accepting of market ideology and values.
Summary

In the last three chapters I have argued that the policies of self management in the reforms of 'Tomorrows Schools' have impacted on the principal recruitment field in different ways. New discourses which emerged from these policies have been interpreted variously by the participants involved. I have also argued that the discourses emerging out of these reforms created complex and often contradictory local responses which were characteristically idiosyncratic and contextual at one level, but also indicated particular dominant readings of reform discourses at another. I am all too aware though that this analysis captures only a small selected piece of the tapestry and invites a particular way of viewing it. On the basis of this partial and particular representation, I bring the study to some final conclusions and discuss the implications of these and recommendations for future policy considerations in the next chapter.
CHAPTER EIGHT

CONCLUSIONS AND POLICY RECOMMENDATIONS

This chapter summarises and discusses the significance of the findings of the research, then looks at the implications of them for policy and practice. The concluding observations finally inform a series of policy recommendations.

The Thesis Argument Summarised

This study set out to find out about a seemingly simple problem of why boards of trustees were not appointing more women as principals. This research indicates the complexity of the ‘problem’ and how the issue of gender diversity is part of a wider set of changing relationships in education. The problem could only be understood when taking into account the context of restructuring, understandings of gender, and theories of policy formulation and adoption. At the macro-level, political and historical contexts provided a shifting landscape. But restructuring produced local practices mobilised by discourses of managerialism and marketisation. National policies have positioned boards simultaneously as powerful and powerless. In turn, national policies have been articulated differently in different school regions and locations. These policy re-articulations have called upon a range of often competing discourses to justify their selection of school principals.

Feminist theorising has, in this study, provided clarity and illuminated understandings of the ways women have been discursively constructed in management and leadership, and in turn has offered insights into how gender discourses were drawn upon by school boards around principalship decisions in highly differential ways. I have argued against the view of women being defined as ‘the problem’, by being blamed as ‘deficient’ or ‘victim’ to innumerable structural barriers, and then not seen
to fit the dominant masculinised culture. Rather, a pervasive binary that persists has discursively positioned women's presence as antithetical to the principalship. This is reinforced by populist and media discourses around notions of boy's 'underachievement', a discourse mobilised because of the feminisation of the teaching workforce.

What's the Problem?

Currently in New Zealand, 60 percent of principals are appointed from an 18 percent pool of male teachers in the primary workforce. Men are six times more likely to be appointed to a principal's position than women. There was a preference in many instances for male principals by boards, even when they appointed women because they were the 'best applicant'. Women make up 40 percent of principals, which is less than half their representation as teachers (81.5 percent) in the primary workforce (MOE 2002).

Yet the official representation of the problem is constituted differently in Ministry policy, despite their own statistics. While it is conceded there is a problem with the principalship, it is about principal performance rather than gender diversity representations. Gender is silenced. This paradoxical representation of the problem is evident from the two recent policy proposals designed to improve principal performance and efficiency — the First Time Principal Training Programme and the Development Centres for Principals. Both are non-mandatory but have been phased in by the Ministry since 2001 to provide professional development for beginning principals in the first case and more experienced principals in the second.

'The problem' is defined as lack of training, not women being excluded or put off by selection processes and practices.

The official discourse recognises the problem is lack of gender diversity but for different reasons. Aitken, the retired CEO of the Education Review Office, saw the problem as three-fold, caused by women themselves
reluctant to apply, which created a problem for boards because the lack of women candidates caused a market shortfall. This in itself, created a problem of choice as the remaining men were not always up to standard in her view. Gender, market and managerial discourses were drawn on in this representation of the problem, where managerial discourse was used in the Ministry representation. Gender discourses featured in NZEI and NZSTA's positions. Women were positioned as 'victim' to structural and cultural barriers by boards, parents, the media and society generally in NZEI's representation of the problem, whereas discourses of masculinist culture were drawn on to position the principalship as alien to women in the NZSTA representation. Male principal advisors re-created the status quo each time they advised boards, and a male culture as role models for boys, was seen by boards as desirable, according to this view.

'The problem' for boards also concerned gender representation, but not in terms of diversity. Overwhelmingly in the interviews, boards revealed that their major aim was to appoint a principal who they perceived best 'fitted' their community, and in most cases this 'best fit' appeared to be a man. In the case of many of the boards who appointed women principals, they did so because of 'market failure', a lack of competent men in the case of the large urban schools, or 'historical experiences' of mismanagement and incompetence by male principals in the smaller rural schools. Ironically, few boards expressed dissatisfaction with their female appointments, and were indeed in most cases pleased.

'The problem' around the principalship then, is differently defined by some of the participants in the study. Some interviewees drew on discourses of managerialism (principal performance); some drew on gendered discourses that tended to position being female as negative and being male as positive; and some drew on discourses of the market.
Policy Context

As I have argued in Chapter Three, the discourses that emerged from the policies that introduced the reforms had differential impact on the field of principal appointments. At the official policy level, the meta discourses were of managerialism. Any reference to equity and social justice in official discourses were marginalised in the decade following ‘Tomorrow’s Schools’. Previous popular discourses of democratic partnership also lost agency and visibility as the reforms progressed in line with the New Right agenda during the 1990s.

However, as this study reveals, in the field of principal appointments these discourses were mobilised to different effect in specific local decision-making contexts. Paradoxically, the meta narrative of managerialism was marginal to that of discourses of masculinity and leadership, which were mobilised in close association with the market in some instances and ethnicity and culture in others. Masculinity, entrepreneurship and competition dominated the language of selection panels rather than official discourses of accountability and policy conformity. In the same way, the local logic was to interpret notions of democratic partnership which has been interpreted by boards as their right to decide who best ‘fits’ their community and school. But ironically, it was the discourse of EEO, merit, equity and social justice that were adopted by boards and mobilised to support appointing male principals. Such decisions were contrary to the original intent of equity policies that sought to have more women represented in the job. But discourses of boys’ underachievement, market image and strong leadership were too closely associated in the public mind. Such decisions were possible because of the unregulated environment in which boards found themselves working, with regards to appointment decisions.
Unregulated context

The lack of regulation and monitoring of principal appointments appears to be an anomaly in the otherwise highly regulated managerial context of education. On the contrary, I argue that it was an intentional policy, consistent with New Public Management theories, and in particular practices derived from the theory of transaction-cost economics. In the situation of creating monitoring systems of principal appointments that are cost effective and yet provide all the complex information needed, the government faced a dilemma. They had to ascertain the degree of risk involved of not monitoring at all, against the cost of monitoring. The costs of a government official sitting in on every appointment clearly outweighed the risk of poor appointment decisions. In this thesis I argue the opposite view, that the risk is high and the intervention warranted.

Apparent from the study was that the unregulated context facilitated a range of discriminatory practices to go unchecked, as the local logic is not necessarily more fair or democratic. That is, local communities can be socially conservative. Gender reform requires strong state intervention centrally as well as local regulation. The study indicates that it is not women who are the problem when explaining their under-representation. Rather, the devolution of principal selection in an unregulated market environment has, along with the popularity of the discourse of recuperative masculinity, combined to work against equity for women.

Significance of the Findings

The major finding in the study was that boards, without regulation from the centre, tended to read and interpret official discourses according to their local logic that reflected community values. Thus the boards in large urban centres with chairs from the business world influenced their appointment processes through market practices, while boards from small rural communities preferred to appoint according to a much more localised, personalised ‘fit’ to the perceived needs and conditions of that local

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community. Woods (1988, in David 1993 p. 101) identified three perspectives on participation in school education in Britain - market-orientated, partnership and instrumental. Smaller schools combined both instrumental and partnership perspectives in their decisions.

The question of how women applicants to the principalship fared within these discursive frames is a far more complex one to consider, and my understandings and conclusions must take into account the limited field and sample used in the study. In terms of the market discourse women were seen as 'the best in a disappointing field', which is significant and indicative of a growing trend. If there had been male applicants of similar quality, experience, competence and qualifications in the field, the decision would probably have gone in their favour. However, that seems to be increasingly not the case. The fields of competence and experience appear to be drawn from the large numbers of women in senior management positions in schools, as endorsed by the statistics, where 80 percent of associate and deputy principals in primary schools are women (MOE 2002). Board chairs from these market-oriented schools also reiterated that they were not interested in principals from small rural schools, even if they were male. They believed that they needed someone who understood large city schools and who had worked in them at a senior level. This certainly reflected the career path of most of the women principals of large schools in the focus-group.

The other significant factor was that the board chairs from the large urban schools were perceptive and shrewd business people. Most of them were Chief Executive Officers of large companies and were experienced in their own way at making decisions, recognising talent and competence. They also recognised their own limitations in terms of expertise especially in educational matters and quite openly admitted this. They were therefore very conscious that whomever they employed as principal, they would need to be confident in and able to trust, and then they could leave them to get on with the job. In the market discourse they were purchasing
expertise, which fitted their notion of how successful businesses are run. This has potential for women in the longer term.

Women did not fare so well however in the small schools, even though this is their most likely destination (Wylie, 1998), because they are the least desirable schools combining both teaching and principal responsibilities. These boards drew frequently on discourses of gender that positioned being female as negative and male as positive, as one of the disparate and idiosyncratic characteristics that constituted 'community fit'. There was a high degree of discrimination against women by some of these boards. However, this was not always the case and there was evidence when being female was an advantage, such as being a mother or having excellent interpersonal skills, although within naturalised discourses of femininity. As with the market discourse, competence was a factor that won women jobs, as many of the transcripts indicated, but again it was often by default because of the lack of competent male candidates. The most disturbing factor was the lack of transparency in the criteria, upon which decisions were based, many decisions being incorrect procedurally and open to appeal if this were monitored. The notion of 'community fit', while a reasonable concept superficially, hid prejudice and procedural injustices, that impacted negatively, particularly against women.

The most significant finding of the study was that some boards are not using nationally approved and consistent appointment procedures, that they have different agendas, that some of these are extremely dubious, and that many are non-transparent. This has effects for both principal applicants and schools. The effects for applicants to the principalship is that the field is inequitable, constituting unknowable terrain that they are expected to traverse each time they apply, where the criteria by which they win or lose are invisible. The study revealed that the effects of these invisible components in the politics of selection are more detrimental to women where there is an unstated preference for male principals and where women fill gaps where there is a lack of suitable male candidates. This situation creates an uncertain climate for applicants, where career
paths no longer follow a series of well defined steps, where pre-
preparation for the position of principal is not always considered essential
and where unsuccessful applicants are unable to understand in many
cases why they missed out or are unable to challenge what they see as
unfair treatment.

I also argue that there are serious implications for schools and children’s
learning from these unregulated appointment practices. Where a board
makes an appointment on dubious and discriminating criteria, the quality
of educational leadership in that school must be questioned. Where
boards are appointing young males with minimal teaching experience and
no leadership experience over more experienced women, just because of
a preference for a male teacher, one must wonder about the quality of
teaching to which they are exposing their children.

This is an area for more research, which would answer some of the
questions raised, not just in my research but other studies as well (ERO,
2001; Whittall 2001). Whittall’s ten year study is about alarming turnover
patterns of small rural principals in one region in New Zealand. One of the
board chairs in this present study talks about picking up the pieces after
exactly that phenomenon occurred at their school (Interview 36).

Implications for Policy and Practice

The principal appointment process initiated by these reforms to self
governing schools has created an imbalance in power between boards
and principal applicants. Boards now have the balance of power in the
appointment process even where there may be questions about their
competence in recruiting. Some schools, especially in small communities,
have difficulty in attracting skilled people on to the board. Principals are
positioned, without their knowledge, in terms of the weighting given to
particular criteria, which may or may not include merit, such as gender and
age, but which are ultimately arbitrary. Power remains with the board,
even if there is good reason to suspect it has discriminated in the
appointment process. Principal applicants have few avenues of redress
other than to withdraw their application. One woman in the study did this,
saying, 'Why would you want to work for a board like that anyway?' (Int.
16, p. 59). The other avenue open is to take a board to the Human Rights
Commission, but this is seen as a less viable option in a small educational
community such as New Zealand. Another woman principal commented:
'It would go round like wildfire and no board would touch you after that'
(Int. 16, p. 46). In effect these boards are missing out on very competent
 principals in many cases. A candidate who reacts against the
unprofessionalism of a board usually has a lot more to offer that school
than the board is capable of recognising. In this sense boards could be
missing out on competent capable people who they are incompetent to
recognise.

It seems clear that the present system for appointing principals needs to
be changed. First and foremost for reasons of social justice, as the
research reveals it is not a socially just system and is riddled with
inconsistencies. In particular it is highly discriminating against women,
allowing conservative, patriarchal and sexist attitudes to flourish. The
research also points to this system being less than effective in terms of
achieving excellence in leadership and in educational outcomes. There
are enough indicators evident to suggest this would be a worthwhile topic
for future research. In the light of the principal recruitment crisis (Gronn
2003) that many Western countries now face, women provide the largest
and most competent group in the educational workforce to meet this
shortage. In Britain this is already starting to happen where 61 percent of
primary principals are women (Fidler and Atton 2004), and where Geoff
Southworth (personal correspondence, August 2002) predicts the future of
leadership in primary schools will be female and collaborative. If the
system in New Zealand is allowed to continue in its present state, where
some boards flout the merit principle and continue to appoint
inexperienced men over experienced women, it will have the effect of
alienating even more women from applying (Brooking et al. 2003).
Policy Recommendations

It would be worthwhile to begin this section by making a number of policy recommendations. The study reveals equity is the area in greatest need of reform and change. However, suggesting more equitable practices amongst boards will have little effect without structural reform. That is, there needs to be reconsideration of the role of the boards in principal selection. There also needs to be greater accountability by the boards, as many will merely go underground with their reasons and documentation processes. There is some awareness of issues in evidence in the more politically astute boards. The focus of reform that will produce more equitable effects must be at the government level. This would be consistent with recent policy changes within the Ministry. Since 2001 it has been clear that there has been a need to pull back in some strategic directions from the initial non-intervention policy of the reforms. The five main principles driving the interventions considered necessary are national cohesion, national systems of funding, uneven performance, efficiency and equity (Connelly 2003). I would therefore argue that interventions in principal appointments are imperative on the basis of uneven performance, efficiency and equity.

The following policy recommendations are listed in terms of level of greatest impact.

Recommendation One

*That the Ministry intervene to put in place accreditation courses for principals and aspiring principals so that a cohort of qualified principal candidates is available nationally to boards, and that boards are required to select only from this nationally accredited list.*

I argue that central government has an obligation and professional interest to guarantee the quality of educational leaders available to lead schools,
and that this is too important a responsibility to be devolved to individual boards, some of which clearly do not have the skills to make appropriate decisions. By providing a register of trained professional leaders, as they do with teachers through the Teachers' Council, the Ministry can then be assured that quality will be maintained. Boards can then make their choices from the national register.

Intervention by the Ministry could involve the contracting out to professional principal associations, Universities or Colleges of Education to provide the accreditation courses and register, but it would need to ensure gender responsiveness and balance in this process, as many principal associations are dominated by men. In New Zealand the Ministry has already intervened in an ad hoc way along these lines in the last two years, but I suggest it needs to go further by providing pre-principal training. As a result of the Intervention policies of the Secretary of Education, Howard Fancy, a First Time Principals' Training programme was set up and trialled in 2001. The programme is non-mandatory, but the Ministry hope it will become something all new principals will attend (Interview 1). It is being run by Auckland University and at the first session in 2002, 191 new principals took part, 112 (58%) of whom were women (MOE correspondence, 24/4/02). Howard Fancy has also put in place plans for principal development courses to upgrade existing principals' professional development, and he has authorised a pilot programme to identify and train aspiring principals. While these three initiatives appear to be taking some responsibility for professional leadership, I would argue they do not go far enough and fall short of compulsory leadership training or a register of accredited principals.

This intervention would immediately change the power balance from the existing situation, giving applicants more power, making it a more equitable balance. It would also immediately improve the potential for more women to be appointed to the principalship, as women statistically are the dominant group of possible applicants. It is also a well-informed guess that women as a group are, even now, more highly credentialled
than men. Questions regarding qualifications in the study, revealed that women in the focus-groups were more highly qualified than the men. These same principals also reported higher numbers of women attending educational administration and leadership graduate classes in Universities and Colleges of Education.

Lastly, this intervention would also alleviate boards' reported anxiety that they lack the educational expertise to make professionally sound selections, giving them at least the confidence that the candidates they choose between, are all professionally capable and educationally competent to do the job. It still allows boards an element of choice for 'community fit' to the local needs of the school, while it reduces the element of perceived 'risk'. On the government's part, the risk of an adverse selection is also dramatically reduced by the instigation of a national register of qualified principal applicants.

Recommendation Two

*That principal advisors are selected, trained and recommended to boards.*

It is also my contention that central government has a responsibility to intervene to set up and authorise specialised training for accredited principal advisors, as a way of ensuring professionalism and equity. Again gender issues would need to be closely scrutinised and integrated into training as many regions are dominated by male advisors, and as my research shows it is these regions in New Zealand where women are having difficulty obtaining principal positions (Interviews 15, 20, 21, 22 and telephone interviews). In one region in particular the principal advisors could be accused of gate-keeping, where their interest in having another male join their old-boy's network of principals was almost one hundred percent effective in terms of influencing boards. As one of them said, 'at that stage I would have been happily satisfied to walk out and know they
[the board] were going to get good quality, and the good thing about that of course, is, it's a fellow colleague later on' (Int. 21, p. 5). I had the distinct impression that the 'lady principals' they talked about previously in the interview, were not in the same court as 'fellow colleagues'.

One concern does occur, however, in regard to creating a recommended list of advisors. It arises directly out of the marketing trend in education in New Zealand, where there is a growing lucrative source of revenue to be gained from schools in the area of principal appointments and appraisals, and where private consultants have been quick to capitalise on this. Most of the advisors to boards have themselves been, or still are, practising principals, but some are not. Boards do not necessarily know this and may not be aware that they are paying for advice that could be educationally unsound. Several of the women interviewed in the telephone interviews and focus-groups spoke of particular consultants that they were less than impressed with. Three of the women said when they heard a particular consultant was advising the board they immediately withdrew their applications (Interview 16 and telephone interviews). The creation of a selected, trained group of principal advisors would help alleviate some of these problems.

**Recommendation Three**

*That boards are required to use the services of a trained principal advisor unless they can provide convincing evidence that this is not necessary.*

The research confirmed that a majority of boards were aware that they do not possess the necessary professional expertise to make educational decisions about leadership and were extremely grateful to have the help and advice of a principal advisor. The interviews with the principal advisors validated this finding. There were also a number of stories told in the interviews where boards who either did not involve an advisor or who ignored their advice experienced 'disastrous' appointments (Interviews 2,
3, 6, 8, 12, 16, 20, 21, 34, telephone interviews). Even where boards had expertise in recruitment as many of the market-oriented boards in my study had, this does not guarantee educational knowledge, and that is what many of these boards realised they were lacking and needing assistance with. They saw this as such an important priority they stated that the Ministry should provide funding for the use of advisors/consultants. At the present time it is not a requirement to use an advisor, although the one other study in this area showed 77 percent of the 192 boards did use one (ERO, 2001).

**Recommendation Four**

*That boards are required to be publicly accountable for the appointment decisions they make and provide much more transparency about the process. That they also be required to produce explanations of decisions to unsuccessful candidates.*

This recommendation is probably the most difficult to monitor, to ensure equitable, non-discriminatory practices and decisions, yet in the absence of any form of accountability it is one of the most flouted practices of boards in the whole appointment process. Legally boards are required to produce a report of the reasons for their appointment decision, yet many appear not to be aware of this. In cases where they have been challenged they can write anything they like in a report. There is no way of contesting this, because the process is so lacking in transparency, in this regard they are virtually above the law.

**Recommendation Five**

*That boards be made accountable for discriminatory appointments by being answerable to a grievance process.*
The fact that aggrieved applicants have no recourse to challenge what they perceive to be an unfair appointment decision, under present legislation, is one of the biggest irregularities in the present system. It illuminates the power imbalance between boards and applicants and makes the latter group dependent on the former. It further establishes the position of boards as being above or outside of the law. It would require further research to establish, but one of my concerns is that many women have been so discouraged by discriminatory decisions with no way of contesting this, they have given up applying for the principalship (telephone interviews). New Zealand cannot afford to be losing potentially good principals in the present environment where there is a shortage of principals. The present employment law in New Zealand is responsible for this anomaly and needs to be revised.

There is a problem for central government with this recommendation however, which flies in the face of a market-driven economy which devolved responsibility to parents. Government has a dilemma imposing accountability measures on a voluntary labour force, which is virtually what boards of trustees are. If they introduced the forms of accountability suggested they may find it difficult to recruit trustees and the whole system would collapse. It is not generally known, but elected chairs and trustees are personally liable for a number of legal misdemeanours (personal communication with educational lawyer Patrick Walsh, 2003) and it is politically expedient that this fact is kept quiet.

Final Conclusion

The problem of the gender diversity representation of the principalship could be resolved relatively easily by the implementation of the recommendations cited above. This would have the result of easing the principal shortage crisis; ensuring a more equitable balance of women principals; maintaining boards' rights to choose a principal of choice, but one based on merit rather than gender; decreasing chances of inappropriate appointments which could impact negatively on student
learning; and enhancing career paths in education, by re-establishing a series of steps based on experience and credentials. Overall it would have the effect of raising the public perception of the profession, and it would guarantee an assurance of quality of principals to boards.

POSTSCRIPT

In 2003, the Primary Principals negotiated a collective agreement with the Ministry of Education that included an objective to establish a Working Party between NZEI, the NZSTA and the Ministry on appointment processes for primary principals with a view to achieving agreed guidelines.

As my research was directly relevant to the working party I contacted people involved, to alert them to it. I had also previously interviewed key people from the Ministry, NZSTA and NZEI at the data gathering stage in 2002, so they were well aware of my research. In spite of this, and the fact that one term of reference was to identify and assess relevant research, no-one from the working party contacted me.

The report of the Working Party on Principal Appointments (Kelly 2004) to the Minister of Education was made public in September 2004 (see Appendix Nine). After reading and critiquing the report I wrote to the Minister, Trevor Mallard (see Appendix Ten), pointing out the flaws in the report's findings and including suggestions on more realistic policy alternatives to those in the report. In November I received a reply back from him (see Appendix Eleven).

In his reply the Minister stated the working party was ‘empowered only to identify a good practice model for boards of trustees to use in their current employment and appointment responsibilities’ (Mallard 2004, p. 1). This solution to the problem, using Bacchi’s (1999) approach, implies the problem lies with boards who are untrained in good appointment practices.
While this analysis is confirmed in some instances in my study, the recommendations provided by the working party will not necessarily address the problem, according to my findings. They ignore the lack of regulation in the appointment process, board autonomy in decision-making, the use of local logics that may be prejudicial and undemocratic and inconsistency in appointing on the basis of merit. A set of good practice guidelines may suggest exemplary practice, but cannot ensure compliance.

While the Minister's reply positions 'the problem' of the appointment process firmly in boards of trustees' camp in the context of the Working Party, it does indicate that the Ministry has a responsibility to 'consider...career pathways for principals and the development of specialist qualifications' (Mallard 2004, p. 1). In this sense Ministry policy is consistent with half of the first policy intervention recommended in this thesis. While it does not go far enough in my view, it is a first step in working towards a more representative principal cohort where the merit principle supercedes gender as the paramount criteria.
References


Gardiner, M., E. Enomoto, et al. (2000). Coloring outside the lines. New York, SUNY.


MOE (2002). Table S1: FTTE of state school teachers. Wellington, Ministry of Education.


NZSTA (2003 Nov.). Educational issues are international. STA News: 1.


Footnotes

1 New Zealand Council of Educational Research

2 Socio-economic status

3 NZSTA is the chief support and training agency for boards

4 This official Ministry publication is most commonly used boards to advertise all educational positions.

5 The socioeconomic rating of the community the school draws from, where 10 is the highest and 1 is the lowest.

6 The U number denotes the roll of the school, from U1 (1-50 students) to U7 (676-850 students). A U5 school has a roll of between 301-500 students.

7 Out of 50 schools in this urban area, women were principals of two.

8 In Maoridom, mana is the acquired status or rank of chiefs or leaders.

9 The marae is the meeting place for the tribe, where discussions or 'hui' take place.

10 A 'hui' is a meeting or discussion, usually involving large numbers of people, which may continue for several days. The closest Western equivalent is a conference.

11 The Treaty of Waitangi is the original legal treaty signed by Maori chiefs and representatives of the British crown in 1840, over land rights and sovereignty rights for Maori.

12 Board members can be paid $50 per meeting for ten meetings each year.

13 In New Zealand teacher registration is granted after two years successful teaching following the gaining of a degree or diploma from a College of Education.

14 A MOE study of 29 boards of trustees appointment practices, conducted 1999. There were 2,700 Boards of Trustees in NZ then.

15 A very small research sample: Two focus-groups with a total of 11 women principals held in 2000 at MOE, Wellington.

16 The new CEO of ERO, Karen Sewell, had obviously been directed to take a much less public line, as ERO stepped out of the limelight and media quite noticeably after her appointment. When I requested an
interview with her I was declined by one of her staff and told she would have nothing further to say to me than was on the ERO website and in their official publications. I persisted as these documents clearly did not answer my questions, but I was prevented from even emailing or talking with her directly. At this point Judith Aitken agreed to be interviewed, which caused even more consternation at ERO as I was told whatever she said was not ERO's official position as she no longer worked there. I was actually more interested in what Judith Aitken had to tell me as she had been the chief executive officer for the period since the reforms and had a long history of the organisation to draw on.

17 The ERO study was a quantitative postal questionnaire received from 192 schools.

18 F denotes a female participant and M a male.

19 The Maori ‘haka’ is a threatening war dance, which in modern times is used at the beginning of rugby matches.

20 See a further discussion of this under methodology section in chapter 2, where the role of this man was discussed in some detail.

21 Outward Bound is a macho, military styled adventure course teaching extreme survival skills / pushing personal limits.

22 A piece of wood.

23 Marijuana

24 A famous New Zealand All Black.

25 Maori name for family, which is a very important concept in Maori culture.

26 Leadspace is the Ministry created website for the first time principals to use to share experiences with each other. All these principals have been leased a laptop for the purpose.

27 As part of the focus-group interviews, demographic details of each school had been gathered, such as student numbers, U status and decile ratings. The U number denotes the size of the school, e.g. U1 has less than 50 students while U7 has more than 700.

28 Maori word for high-born or high status leadership position.

29 The Education Review Office have a website that the public can use to read ERO reports of schools. This becomes another marketing tool deliberately set up by the centre.
Management units are worth $2,500 each and are awarded to staff for additional responsibility at the discretion of the board and principal. They boost AP's and DP's salaries in large schools.
that are to be taken into account by employers in assessing the performance of teachers.

(2) Before the chief executive of the Ministry of Education prescribes any matters under subsection (1) of this section, the chief executive of the Ministry shall consult with—

(a) The Teacher Registration Board; and
(b) The chief executive of the Education Review Office; and
(c) Representatives of employers of teachers; and
(d) The organisations of teachers that represent teachers who will be subject to the matters prescribed under this section.

(3) Nothing in this section prevents the prescribing by an employer of matters to be taken into account in assessing the performance of teachers employed by that employer (being matters which are not inconsistent with any matters prescribed under this section by the chief executive of the Ministry and which apply to teachers employed by that employer).

[(4) Nothing in this section shall apply to any teachers employed in any university, [polytechnic, college of education], or early childhood institution.]

Sub. (4) was added by s. 20 of the State Sector Amendment Act (No. 2) 1989.

In sub. (4) the words in single square brackets were substituted for the former words by s. 50 (1) of the Education Amendment Act 1990.

[77d. Equal employment opportunities—(1) The chief executive of the Ministry of Education shall be responsible for promoting, developing, and monitoring equal employment opportunities, policies and programmes in the Education service.

(2) Every employer—

(a) Shall in each year develop and publish an equal employment opportunities programme:
(b) Shall ensure in each year that the equal opportunities programme for that year is complied with.

(3) Every employer [(other than the Council of an institution within the meaning of section 159 of the Education Act 1989)] shall report annually to the chief executive of the Education Review Office providing—

(a) A summary of the equal employment opportunities programme for the year to which the report relates; and
(b) An account of the extent to which the employer was able to meet, during the year to which the report relates, the equal employment opportunities programme for that year.
(4) The chief executive of the Education Review Office shall incorporate a summary of the reports received under subsection (3) of this section in the annual report of that Department.

(5) For the purposes of this section and section 77A of this Act, an equal employment opportunities programme means a programme that is aimed at the identification and elimination of all aspects of policies, procedures, and other institutional barriers that cause or perpetuate, or tend to cause or perpetuate, inequality in respect to the employment of any persons or group of persons.

In sub (5) the words in double square brackets were inserted by s. 26(3) of the Education Amendment Act 1991.

[77e. Employees of institutions—(1) Subject to the provisions of any Act relating to the registration of teachers, each employer—

(a) May from time to time appoint such employees (including acting or temporary or casual or relieving employees) as the employer thinks necessary for the efficient exercise of the functions, duties, and powers of the institution; and

(b) May, subject to any conditions of employment included in [[the employment contract applying to the employee]], at any time remove any employee from that employee’s employment.

(2) Unless expressly provided to the contrary in this Act, the employer shall have all the rights, duties, and powers of an ordinary employer in respect of the persons employed in that institution.

In sub (1) (b) the words in double square brackets were substituted for the words “any award or agreement” by s. 11 of the State Sector Amendment Act 1991.

[77f. Duty to act independently]—In matters relating to decisions on individual employees (whether matters relating to the appointment, promotion, demotion, transfer, disciplining, or the cessation of the employment of any employee, or other matters), the employer shall act independently.

[77g. Appointments on merit]—An employer in making an appointment under this Act shall give preference to the person who is best suited to the position.

[77h. Obligation to notify vacancies]—Where an employer intends to fill a position that is vacant or is to become
Appendix 2

Questionnaire sent to 150 Boards of Trustees

9 September 2002

Dear Board Chair,

My name is Keren Brooking and I am a senior Lecturer at Massey University, doing my PhD at Deakin University in Australia on the selection of principals in New Zealand primary schools. I would like to invite you to participate in the research project by filling in this short survey. I am being supervised by Professor Jill Blackmore from Deakin University and Dr. Marian Court from Massey University.

The aim of this research is to gain a better understanding of the practices and procedures boards of trustees use to select and appoint principals in primary schools in New Zealand, as well as their ideas about the kind of principal they are seeking. A key purpose of this research is to shed light on why women comprise a low proportion of the principals in primary schools and to develop strategies to redress the imbalance. Hence, one of the questions I have is ‘are women applying for the principalship’? I would be grateful if you could fill in the accompanying questionnaire and return it to me. I am surveying primary schools that have advertised for a principal in recent months in the Gazette, as this data is not collected nationally. You are under no obligation to participate in this research, but if you do, your response will be aggregated into a database and no schools will be identifiable. Consent forms will be stored separately to encoded data to further ensure confidentiality. If you would like more background information about my research project please email me on k.j.brooking@massey.ac.nz or phone me on 06) 351 3387.

Thank you for your assistance,

Keren Brooking
Senior Lecturer
Massey University College of Education
SURVEY

Name of School: ____________________________________________
(optional)

Size of school: ____________________________________________
(U 1-6)

Decile rating of school: ____________________________________________

Rural or urban school? ____________________________________________

How many applications did you receive for your recently advertised principal's position? 

How many of these were women applicants? 

How many applicants did you short-list? 

How many of these were women? 

Was a man or woman appointed to the position? 

What age bracket does s/he fit into? (circle one)

20-30  30-40  40-50  50-60
Are women applying to become principals, asks researcher

MoE statistics in 2001 revealed that 62 per cent of the principals in New Zealand primary schools were men, while they made up 19 per cent of the teaching workforce.

Women, on the other hand, made up 81 per cent of that workforce, but only 38 per cent of principal positions.

Men are disproportionately represented in the large, high salaried, high status, non-teaching principal positions particularly in the urban areas.

Women are more often appointed to the teaching principal positions in the U1 and U2 schools, often in rural areas, or to special schools, special character schools or girls schools.

There are regional variations throughout New Zealand - some urban centres are more inclined to appoint women to the larger schools, but there are some regions where it is difficult for a woman to get a principal's position at all.

Karen Brooking is doing PhD research on board of trustees appointment processes and is interested to know whether women are applying for principal positions in primary schools, and what their experiences are as a result.

As the MoE do not collect statistics on who is applying for positions, Karen is inviting interested women to phone her collect, to recount their experiences.

Karen is a senior lecturer at Massey University College of Education doing her research through Deakin University in Australia. The usual ethical procedures will apply to the telephone interview. She can be contacted on 0800 MASSEY (0800-627 739) extn 8687.
(5) At any meeting of the Commission the presiding member shall have a deliberative vote and, in the case of an equality of votes, shall also have a casting vote.

(6) All questions arising at any meeting of the Commission shall be decided by a majority of the valid votes recorded thereon.

(7) Subject to the provisions of this Act and of any regulations made under this Act, the Commission may regulate its procedure in such manner as it thinks fit and may prescribe or approve forms for the purposes of this Act.

Cf. 1977, No. 49, s. 10

20. Further provisions relating to Commission and Race Relations Conciliator—The provisions of the First Schedule to this Act shall have effect in relation to the Commission and the Race Relations Conciliator.

PART II

UNLAWFUL DISCRIMINATION

21. Prohibited grounds of discrimination—(1) For the purposes of this Act, the prohibited grounds of discrimination are—

(a) Sex, which includes pregnancy and childbirth;
(b) Marital status, which means the status of being—
   (i) Single; or
   (ii) Married; or
   (iii) Married but separated; or
   (iv) A party to a marriage now dissolved; or
   (v) Widowed; or
   (vi) Living in a relationship in the nature of a marriage;
(c) Religious belief;
(d) Ethical belief, which means the lack of a religious belief, whether in respect of a particular religion or religions or all religions;
(e) Colour;
(f) Race;
(g) Ethnic or national origins, which includes nationality or citizenship;
(h) Disability, which means—
   (i) Physical disability or impairment;
   (ii) Physical illness;
   (iii) Psychiatric illness:
(iv) Intellectual or psychological disability or impairment:
(v) Any other loss or abnormality of psychological, physiological, or anatomical structure or function:
(vi) Reliance on a guide dog, wheelchair, or other remedial means:
(vii) The presence in the body of organisms capable of causing illness:

(i) Age, which means,—

(i) For the purposes of sections 22 to 41 and section 70 of this Act and in relation to any different treatment based on age that occurs in the period beginning with the 1st day of February 1994 and ending with the close of the 31st day of January 1999, any age commencing with the age of 16 years and ending with the date on which persons of the age of the person whose age is in issue qualify for national superannuation under section 3 of the Social Welfare (Transitional Provisions) Act 1990 (irrespective of whether or not the particular person qualifies for national superannuation at that age or any other age):

(ii) For the purposes of sections 22 to 41 and section 70 of this Act and in relation to any different treatment based on age that occurs on or after the 1st day of February 1999, any age commencing with the age of 16 years:

(iii) For the purposes of any other provision of Part II of this Act, any age commencing with the age of 16 years:

(j) Political opinion, which includes the lack of a particular political opinion or any political opinion:

(k) Employment status, which means—

(i) Being unemployed; or

(ii) Being a recipient of a benefit or compensation under the Social Security Act 1964 or the Accident Rehabilitation and Compensation Insurance Act 1992:

(l) Family status, which means—

(i) Having the responsibility for part-time care or full-time care of children or other dependants; or

(ii) Having no responsibility for the care of children or other dependants; or

(iii) Being married to, or being in a relationship in the nature of a marriage with, a particular person; or

(iv) Being a relative of a particular person:
Sexual orientation, which means a heterosexual, homosexual, lesbian, or bisexual orientation.

(2) Each of the grounds specified in subsection (1) of this section is a prohibited ground of discrimination, for the purposes of this Act, if—

(a) It pertains to a person or to a relative or associate of a person; and

(b) It either—

(i) Currently exists or has in the past existed; or

(ii) Is suspected or assumed or believed to exist or to have existed by the person alleged to have discriminated.

**Discrimination in Employment Matters**

22. **Employment**—(1) Where an applicant for employment or an employee is qualified for work of any description, it shall be unlawful for an employer, or any person acting or purporting to act on behalf of an employer,—

(a) To refuse or omit to employ the applicant on work of that description which is available; or

(b) To offer or afford the applicant or the employee less favourable terms of employment, conditions of work, superannuation or other fringe benefits, and opportunities for training, promotion, and transfer than are made available to applicants or employees of the same or substantially similar capabilities employed in the same or substantially similar circumstances on work of that description; or

(c) To terminate the employment of the employee, or subject the employee to any detriment, in circumstances in which the employment of other employees employed on work of that description would not be terminated, or in which other employees employed on work of that description would not be subjected to such detriment; or

(d) To retire the employee, or to require or cause the employee to retire or resign,—

by reason of any of the prohibited grounds of discrimination.

(2) It shall be unlawful for any person concerned with procuring employment for other persons or procuring employees for any employer to treat any person seeking employment differently from other persons in the same or
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**TOTALS**: 586 Women, 257 Men
Appendix 6

Advertisements in *New Zealand Education Gazette*, 2 September 2003, p. 69

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**Tolaga Bay Area School**

**DEPUTY PRINCIPAL**

(4-5 MUI U4 [M - 13])

We are seeking an energetic, strategic thinker, with great interpersonal skills and management experience to join our senior management team, staff and school community. Responsibilities include Leader of Curriculum. A great opportunity for career progression. Generous professional development.

Have you got the balls to do this job? Have you got the skills to use your balls effectively?

We need a good ball juggler, a person—

- who is discerning about which balls to throw
- who can successfully keep a lot of balls in the air without dropping them
- who can skilfully juggle in a team

The ball is in your court. Clowns need not apply.

An information pack is available. Applications close 13 September 2002 at 4.00pm and should be addressed to Principal, Tolaga Bay Area School, Resolution Street, Tolaga Bay.

Contact details – ph 06 8626765, fax 06 8626698 or nori.parata@uoww.ac.nz

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**Southwell School**

**Headmaster**

The Headmaster of Southwell School will take up a new position in 2003 after nine year's service.

Southwell School is a leading Independent co-educational Boarding School situated on 35 acres in the heart of Hamilton City. The roll stands at 600 with 80 Boarders. The school has attractive park-like grounds surrounded by large trees and many fine buildings. The school has a long-standing tradition of strong values-based education and has a supportive Board, staff and community.

The successful applicant will:

1. Have a passion for education and a love of learning.
2. Care about people.
3. Have strong communication, leadership and strategic planning skills.

All enquiries and applications should be directed to:
Marg Heeney, Senior Manager, Deloitte HR, Ph 09 303 0803 or email lligibs@deloitte.co.nz.

For details and views of the school visit www.southwell.school.nz. The closing date for applications is Friday 27 September 2002.

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Appendix 7

CECILY'S STORY

Cecily: I mean I felt aggrieved, and as soon as I didn't get the job, having been short-listed, I decided that O.K. the message from our board was that it was good enough for me to do all the school development, lead all the curriculum development, do all the performance management stuff, but when it came to two females and a male who had been my third year student in the past, to appoint him into one of the biggest intermediates in [place name], I felt was rather revealing.

Interviewer: So he got the job over you?

Cecily: Yep, the Deputy Principal and the Associate Principal, we were both short-listed. The DP was ten years older than I was, but she was a highly professional and extremely good applicant as well, and I won't say I would have happily worked under her, but she deserved the position like I felt I did. Then when we were short-listed the principal who was retiring, was referee for all three of us. Now can you beat that? I was still kind of smarting a bit having put so much energy into the school, it wasn't until I went to conference and I just kind of sat back and listened to what other people were saying and realised that there was a lot of talk... You've got to look at where the boards of trustees are coming from. But I went to see the principal advisor on the panel...and I said, "Where did I go wrong? Were there any areas that I needed to sharpen up on as far as the interview process went?" He said, " I felt your interview was superb."

Interviewer: So this guy was a younger less experienced guy, was he?

Cecily: Way less experienced. I had him as a third year student. He did a couple of years in an intermediate. He went overseas for a while. Well he came back and he worked for a little while, then he got appointed to a U2 as a principal...was in that position, and I mean talking to those principals, they said he didn't have a clue really about the things that he needed to know in small schools. He just didn't have the background. He didn't have the experience...But the whole thing I guess that really annoyed me was the fact that they were saying that you were doing a great job there, but the chances of you moving up within your own school or into a bigger one were really non-existent.

Interviewer: So there is a glass ceiling?

Cecily: Yes. I mean I can understand. I think it is good for schools to get new blood...and had he done the hard yards and had the qualifications, don't get me wrong...then I would have quite happily accepted the position, but I just didn't have what I call professional respect, because I didn't think he'd earned it. I was hurt I guess about my whole first experience, but when I went to conference and when you get those people saying to you, "Oh everyone feels that you and Karen were shafted". I thought, "Oh, so it isn't just me." It was a perception amongst other colleagues and it actually made me feel better. It's a hard lesson really. I felt personally affronted by the board (Int. 6. Woman principal of small school).
Interview Questions from “Neighbourhood School” Case Study

Interview Questions For Principal Appointment

Introduction
1. Thank you for allowing us to visit your school. Why have you decided to apply for the present position at our school?

2. What qualities do you believe you can bring to the Principal’s position?

Leadership
3. How would you describe your leadership style?

4. What part do you see other staff playing in the leadership and management of the school?

5. How has your professional development over the last few years influenced your practice?

6. Before this interview you had a chance to think about some kind of development or change that you have led. Please tell us about that process now.
Curriculum Leadership
7. This school has developed a very clear Core Culture, which underpins everything we do.
   What has been your experience identifying, developing and maintaining a strong core culture?

8. How do you ensure quality curriculum delivery in each and every classroom?

9. What do you believe are the principles of good assessment?

Communication
10. In a large school like this how would you ensure there's effective communication with the staff?

Management & Administration
11. How do you manage professional development for staff in your present school?

12. What about a teacher who is struggling in the classroom? How do you cater for that? (Tell me how that links into your school's staff appraisal system?)
13. What underpins an effective behaviour management system?

Partnerships

14. What is your understanding of partnership with regard to the Treaty of Waitangi and the revised NAGs?

15. What are your thoughts on how to address the disparities in the achievement of Maori and Pacific Island students?

16. Some of our parents are supportive and interested in the work of the school. How would you encourage others to be more involved?

17. Children come to school from a wide variety of backgrounds and experiences. Can you tell us about experiences you have had in catering for the exceptions in terms of social, behavioural or learning needs.
18. What are your expectations of the Board of Trustees?

19. What do you think the Board could expect of you as Principal of the school?

20. How do you manage the work-load of a busy school leader?

Closing
21. We may not have covered all the areas you wished us to. Are there any other things you would like to share with us?

22. Are there any questions you would like to ask us?
School – Principal Appointment

Prepared Question

Question posed for consideration half an hour prior to the interview, for prepared response.

In your leadership experience you will have led a team, group or whole staff through some development and or change process. We would like you to reflect and tell us about your experiences.

First describe a process, which you believe went very well.
• Outline the features which contributed to the success
• What role you played.
• Why you felt it went well.

Second describe a process, which did not go as well as you might have wished.
• Explain the reasons you feel may have contributed to this.
• What role you played.
• How you would go about it differently to ensure a more successful outcome?
Appendix 9

Report to the Minister of Education

Report to the Minister of Education of the Working Party on Primary Principals' Appointments

(download a full copy including "good practice process steps" PPAWP Final Report.doc)

Introduction

1. During the negotiation of the Primary Principals' Collective Agreement (2003-2004) it was agreed that a Working Party between NZEI Te Riu Roa (NZEI), the New Zealand School Trustees Association (NZSTA) and the Ministry of Education (Ministry) would consider appointment processes for primary principals with a view to achieving agreed guidelines.

2. The parties have agreed on a good practice process for principal appointment which is attached to this report.

3. The Terms of Settlement note that the recommendations of this report that the parties agree on will be binding on the parties.

Purpose

4. The Ministry of Education and NZEI agreed, as set out in the Heads of Agreement of the Primary Principals' Collective Agreement (2003-2004) to form a Working Party on appointment processes for primary principals. The Terms of Reference of the Working Party are attached as Appendix 1. The scope of the working party was to:

1. identify and assess relevant research and resources on the appointment of principals in primary schools;

2. identify existing practices both within the education and wider state sector for making appointments to senior management positions;

3. identify the legislative requirements on employers;

4. examine issues of process and resources which underpin and support good practice appointment processes to senior positions;

5. develop guidelines for trustees and union members incorporating agreed best practice appointment processes; and

6. agree how best practice can be promoted effectively.

5. Note that the parties could not reach agreement on whether area 5 of the scope meant that one guideline publication, or the basis for several guidelines, should be the desired output of the working party. It was the latter that was achieved and all parties have agreed, therefore, to base any process advice on the agreed good practice process.

6. Note that area 6 in the scope was not covered. It was not possible during the working party to decide how the agreed good practice process could be
best promoted.

Membership

7 It was agreed that the Working Party would comprise the following members:
   a up to four representatives from the Ministry of Education;
   b up to four representatives from the NZEI; and
   c up to four representatives from NZSTA.

8 The Working Party was chaired by Janet Kelly, an independent education consultant.

Opening comment

9 The Working Party members were unanimous that the most critical decision a board makes is the appointment of a principal. The Working Party also noted that in the majority of cases, the board members will be making their first leadership appointment in the education context. Approximately 10 per cent (220) of primary principals are appointed in any one year and approximately 59 per cent of these (130) will be first-time primary principals.

10 The Working Party believes that principal appointments are generally managed well and result in sound appointments. The Working Party notes that little reliable information is available on whether or not the best person was appointed to any individual position. The impact of 'poor' appointment processes would be that the 'best' candidate was not selected and/or an inappropriate appointment was made.

11 Given the importance of principal appointments to the effectiveness of schools, and the challenges inherent in all appointments, the parties strongly agree that there is value in promulgating advice on best practice in appointment on which there is a high degree of agreement. By doing so, we intend that best practice becomes common practice. NZEI Te Riu Roa considers that one binding process is the best way to enforce best practice.

Process

12 The Working Party met five times and worked to the following process:
   a consideration of the following material:
      · the legislative and contractual environment;
      · recent research literature on principal appointment;
      · currently available resources and process advice;
      · a sample of principal application packs for vacancies in one issue of the Education Gazette; and
the State Services Commission's process for the appointment of public service chief executives.

b synthesis of the above material;

c agreement to many core elements of a good practice process; and

d consideration of the cost of appointment.

Findings

Legislative and contractual environment

13 All employers have obligations under the Employment Relations Act 2000, the Human Rights Act 1993 and the Privacy Act 1993. The State Sector Act 1988 adds to the responsibilities of boards of trustees by requiring that:

a preference shall be given to the person best suited to the position;

b a board of trustees, or any Commissioner that replaces that board, is the legal employer of all staff;

c a board of trustees must act independently, and others must not influence a board, in decisions on individual employees;

d wherever practicable an employer shall notify the vacancy or prospective vacancy in a manner sufficient to enable suitably qualified persons to apply for the position;

e a board of trustees must operate a personnel policy that complies with the principle of being a good employer including provisions related to safe working conditions, EEO, impartial selection, and the recognition of the aspirations of various groups.

14 The Education Act 1989 provides that:

a a board of trustees has complete discretion to control the management of the school as it thinks fit, subject to the law;

15 The Primary Principals' Collective Agreement also requires the following:

a all positions of at least one year's duration must be advertised nationally;

b all appointments to advertised positions shall be permanent unless there are genuine reasons on reasonable grounds for appointing for a fixed term

c in appointing the person best-suited to the position a board will have regard to the experience, qualifications and abilities relevant to the position and such other relevant matters as it determines;

d job descriptions must be provided to all applicants;
EEO principles shall be followed;

The Primary Principals' Collective Agreement 2003-04 also has the agreement that principals need to:

a. discharge well the specific responsibilities placed on the principal; and

b. lead and imbue the employees with a spirit of service to the school and the community; and

c. manage the school in a responsible manner that promotes quality education, accountability and the proper use of resources; and

d. maintain appropriate standards of integrity and conduct among employees and ensure the well-being of students attending the school; and

e. manage the school in a way that gives effect to the objectives of the school charter and the school's strategic direction; and

f. meet or exceed the Professional Standards for principals; and

g. maintain effective working relationships with the board, community, parents/caregivers, staff and students; and

h. promote fairness, integrity and equal employment opportunities within the school.

Recent research and literature on principal appointment

The Ministry of Education, NZEI Te Riu Roa, and NZSTA provided recent literature on school senior management appointments. The Ministry of Education provided a research report on principal appointment processes, undertaken in 1999.

These principles were common:

a. the job description and person specification are the foundation of the appointment process, so they should be based on the day-to-day reality of the job, and be clear to prospective applicants;

b. 'fit with the school' is a valid concept to use in appointment, provided it is closely defined at the beginning of the process and does not become shorthand for individual prejudices;

c. the understanding of fit with the school should also be communicated to applicants so they can provide relevant information;

d. past relevant performance is the best predictor of future performance, so a selection process should focus primarily on reliable information about past performance;

e. verbal interviews of referees are preferred to written referee reports as the former can be used to provide information more closely related to the selection criteria; and
information from referees needs to be evaluated, so it should be standardized through planned questions.

In a few instances, the literature noted that:

a. an overly complex or overly public process is likely to put off the best candidates; and

b. training for board members is a good investment.

Resources and process advice

The key resources for boards were identified as:


b. *Trustees Handbook* and Advisory Services — NZSTA

c. *Employment in Education* — SSC 1989

d. Independent consultants/local principals

e. Other schools' appointment policies from websites

Information that is additional to currently available advice was tabled by the parties. NZSTA tabled their draft guideline *Appointing a Principal*. NZEI Te Riu Roa tabled *Successful Appointments* a 2003 report from Marshall Consulting, and a draft guideline document from the NZEI Principals Council *Appointment of Principals: best practice guidelines*.

NZSTA is producing a guideline publication for boards of trustees on the appointment of principals. NZSTA has asked NZEI Te Riu Roa and the Ministry to review and provide comment on this in order to ensure that the agreements of the working party are reflected in the publication.

Added to this material for consideration were the internal recruitment guidelines of the Ministry of Education and the State Services Commission.

Sample of principal application packs

The Working Party considered several recent examples of application packs for principal positions to check current practice, and the content and presentation of these packs. The significant findings were:

a. job descriptions were done well in some cases, but were quite variable overall. In some cases the job description was actually a person specification, in others it was largely a repetition of the professional standards for principals or was omitted from the application pack altogether.

b. consent to contact a previous employer was generally sought, but some application forms carried no consent clause. One form sought permission to contact the Teachers Council.
c EEO statements were often omitted, and in one case a question about marital status was on the application form.

State Services Commission process for the appointment of public service Chief Executives

25 The Ministry of Education met with SSC’s Chief Executives Branch to discuss their process. In summary:

d the process is slow, measured and costly. In addition to a permanent specialist unit within the Commission, each appointment involves the cost of an international search and advertising effort;

e written references are not required in applications. Applicants provide names of referees and the Commissioner generally only contacts the referees of the preferred candidate after the interview

f consultants conduct interviews with candidates and provide recommendations to the Commissioner, including who should be re-interviewed, and areas the interview could focus on;

g the current needs and direction of the agency are carefully considered, and become the substance of the position description;

h consultants use standardised role-play scenarios to identify whether an applicant’s basic values and behavioural responses to management situations are consistent with those they report in the interview.

Discussion

26 After consideration of this material, the Working Party discussed the steps that should be included in a good process. Below are significant areas of agreement, and discussion of areas where a joint perspective was not achieved.

Notable agreements

References

27 The Working Party agreed that information from referees is crucial to decision-making. Appointment processes in the public sector generally use verbal contact with referees to confirm information gained in the interview. However, in almost all of the application packs sampled, three written referees reports were required with all applications.

28 This is burdensome, and probably does not provide useful information. The Working Party recommends that written references not be sought, and that shortlisting decisions be based on application forms and CVs. Verbal contact with referees is better used to validate interview information and explore any areas of concern raised by an interview.

Background checking

29 Additional information on applicants' backgrounds is important to the appointment process. Boards sometimes contact former employers and the New
Zealand Teachers Council for information about applicants. The Working Party agreed that boards may need to seek other information, and that applicants need the ability to contextualise and/or clarify any information that is gathered.

30 The Working Party’s advice is that the following privacy clause be added to application forms: “contact with additional individuals or statutory organisations who can comment on your professional work will not be made without first notifying you.”

Privacy

31 The Working Party noted that there are a variety of approaches to notifying interviewed candidates of an appointment decision. Once an offer has been accepted, then all those interviewed should be notified immediately.

Appointments groups

32 The Working Party agreed that the whole board, less the incumbent principal, should decide what will happen at each stage of the process. The Working Party did not consider it possible to recommend whether an appointment group/subcommittee should be appointed, or that the whole board should undertake the process together.

33 Involving the whole board in the process may prove useful for ownership of the decision. However, it may make for a large and potentially intimidating interview panel that is difficult to schedule.

34 The interests of staff are important to take into consideration to provide ‘fit with the school’ and teaching and learning perspectives, and NZEI considers that a staff member should also be involved in order to assure their fellow professionals that fair process was observed and the best candidate selected.

35 The Working Party was not able to agree whether the elected staff representative should automatically be an interviewer or one of the appointment decision-makers. There could be a conflict of interest in individual staff members being involved in the final decision. Nonetheless, the Working Party acknowledges that many boards consider that this is consistent with their school culture.

Privacy

36 The Working Party noted that if applicants are asked to make a presentation to the school community, their privacy is effectively removed. This is also true when applicants are invited to social gatherings. Although the Working Party questions the value of the practice the Working Party understands that some schools, in particular Kura Kaupapa Māori, consider this important to their appointment process.

37 NZEI Te Riu Roa considers that public presentations and social functions should not be used in the selection process under any circumstances.

38 NZSTA’s view is that some boards consider it in the interests of building relationships with the school community that presentations from the candidates are
a part of the process, and NZSTA emphasises that where this occurs it is necessary
to ensure that it is undertaken in a professional manner.

39 The Working Party considers that information gathered at such events,
should they occur, should be directly related to the selection criteria, and that a
checksheet would assist in ensuring uniformity and relevance of the assessments
made.

National advertising and appointment

40 NZEI Te Riu Roa consider that because of the State Sector Act 1988
provision described in 12d and because of commitments in the collective
employment agreement, the government is obliged to support nationwide
applications for principal positions.

41 NZEI Te Riu Roa considers that travel costs may pose a barrier to
nation-wide applications for nationally advertised positions, and that this indicates a
need to target some resources to boards to assist applicants who may be
disadvantaged because of their distance from the school. NZSTA agrees that the
appointment process can be costly, but that in the pre-selection phase some steps
can be replaced with other methods including video-conferences.

42 The Ministry of Education notes that in a limited number of situations,
out-of district appointments can already attract funding. If a teacher or principal
relocates to fill a Priority Staffing Status position and gains a National Relocation
Grant, then the board can gain a National Recruitment Allowance payment of
$2,500 to be used in any manner, including such appointment costs as travel
subsidies. These costs need not be the costs incurred by the successful applicant.

43 All positions in decile 1-4 schools in Northland, Auckland, Tokoroa,
Wairoa, Gisborne and West Coast regions or the
South Island automatically have
Priority Staffing Status and if a board is experiencing severe difficulty in filling a
position, including having to re-advertise due to lack of suitable applicants, they can
gain apply to the Ministry of Education for Discretionary Priority Staffing Status to
apply to that position.

Affordability of process advice

44 NZEI Te Riu Roa is concerned that boards may not get enough process
and/or professional advice because of the cost of an advisor. NZEI Te Riu Roa
considered that government funding should be available to employ an advisor who
mets specific criteria, and suggested that a fund to assist boards be accessible to
boards who gain an attestation that they have followed best practice in making an
appointment.

45 NZSTA considered that funding for advice would be appropriate,
provided it was not subject to any conditions that impinge on boards’ autonomy in
employment matters.

46 The Ministry of Education considered that any measures to support
appointment processes should not be a burden on all boards, most of which who do
not need additional support. Instead, any additional support would be better
targeted to boards that may be at risk of not effectively managing the selection
process. The viability of this targeting would depend on whether such an
identification would be possible, and there was not scope within the Working Party to further consider this question.

Recommendations

47 The Working Party recommends that you note that the outcomes of the working party can be summarised as follows:

- matters of agreement, recorded in paragraphs 27-31;
- an agreed good practice process for principal appointments contained in Appendix 2 of this report;
- agreement that the parties will reflect the matters of agreement and incorporate the good practice process into any guidelines or advice to boards, principals or teachers; and

48 The Working Party recommends that you note:

- guidelines still need to be developed to reflect (47.b) above and NZEI considers that more joint work to produce a joint guideline would be desirable.

Janet Kelly
Chair

Rowena Phair
Ministry of Education

Colin Tarr
NZEI Te Riu Roa

Colin Davies
NZ School Trustees Association
17 September 2004

Trevor Mallard
Minister of Education
Ministry of Education
Private Bag 11666
Wellington

Dear Sir,

REPORT OF THE WORKING PARTY ON PRIMARY PRINCIPALS' APPOINTMENTS

You will have recently received a copy of the above report. I am writing to point out –
(a) how flawed I believe the findings in this report are; and
(b) what recent research suggests might be more realistic policy alternatives

I am in the final stages of completing my PhD thesis on “Boards of Trustees’ Selection Practices of Principals in Primary Schools” where, in 2002 I interviewed board chairs, principals and principal advisers from all over New Zealand, and conducted three in-depth case studies of the appointment of a principal. Prior to beginning this research I had directed the EFO Contract supporting boards of trustees, for the Ministry of Education for six years from 1995 to 2001. My doctoral research led directly from the experiences of this contract where my twelve facilitators and I spoke with hundreds of board members throughout New Zealand, and were very concerned that boards were not always appointing on merit. My research has confirmed this and has raised some important concerns about the principal appointment process, which I believe should be considered in light of any new policy development in this area.

It was with interest as a result, that I read the report of the working party on primary principals’ appointments. In the light of my research findings, I find this report seriously flawed in both its terms of reference and its recommendations. I would like to draw your attention to the following points:

It ignores relevant research
- The scope of the working party was to firstly identify and assess relevant research in this area. I had interviewed Rowena Phair and Stephanie Nichols from the Ministry of Education in 2002 so they were aware of my research, as was NZEI and NZSTA as I had reported findings to them in 2003. However, in spite of my research being the most comprehensive study in this area in New Zealand, no-one from the working party contacted me to read about my findings.
It restates already known polar positions of key parties

- Points 5 and 6 in the report comments on how the parties could not reach agreement on various aspects. This is not surprising. As part of my research, I interviewed key policy people from the Ministry of Education, NZEI and NZSTA to ascertain what they saw as the problem with the appointment process. Each group saw the problem differently. In brief, NZEI saw the problem arising from poor appointments due to untrained board members; NZSTA saw the problem being principal advisers from ‘old boy networks’ recreating themselves (i.e. provider capture); while the Ministry didn’t see a problem at all with the appointment process, but identified the problem as inefficient and ineffective principals who are sometimes appointed. My conclusions are far more complex and relate to the unregulated context boards work in, in the appointment process where they have total autonomy to make whatever decision they like; where they are not accountable for the decision they make except in having to live with it, where there is no transparency for public scrutiny; and where boards are in effect protected from grievance procedures from dissatisfied applicants, under the present Employment Relations Act 2001 which allows grievances only from present employees. I believe this Act is being amended at the present time.

It asserts there is no major problem, without stating any grounds or evidence

- Point 10 of the report states ‘the Working Party believes that principal appointments are generally managed well and result in sound appointments’. As there is absolutely no comprehensive data on this, I don’t see how they can make such an assertion. I searched for similar data in my research and found the 2001 ERO study on principal appointment procedures the only study in New Zealand where a substantial number of boards had been surveyed. However, this research is methodologically flawed by the self-reporting aspect it relies on, with no triangulation. As I found working on the EEO contract, what boards say they are doing is not always what they are doing.

It's data-gathering methodology is seriously flawed

- Point 12 outlines the material considered as a basis for making recommendations. I find two aspects of this astounding to use as a basis for good practice recommendations, and argue that as a research strategy there are serious flaws:
  - A sample of principal application packs for vacancies in one issue of the Education Gazette.

In my research I found the process boards used to put together an application pack to have huge limitations. Even with the “best” boards I observed, they borrowed packs from up to four other schools, selected the phrases they liked, then came up with an amalgam that was often highly unrealistic, particularly in terms of person specifications. Most boards did not start with a clean slate and ask “what sort of person do we want for our school and what do
we want them to do?”, and then develop criteria from that. I would argue that while a good application pack is important, it does not necessarily ensure that the best person for the job is appointed.

- Using the State Services Commission’s process for the appointment of public service chief executives. While the SSC appointment process might be the ultimate to which other parts of the public service aspire, it has been developed in an entirely different context to schools and cannot therefore be applied or transferred directly.

- The working party ignored the most crucial stage in the appointment process in my opinion, in their gathering of information. My findings show that the final decision of who to employ rests on the interview stage and the impressions created. Any research that ignores the interview stage is therefore seriously inadequate.

It ignores the differences of the educational context as distinct from the public service generally

- The contextual differences in the education setting that my research exposed that need to be taken into account, include:
  - lay board members who are often inadequately trained, prepared or experienced to make professional appointments in education, based on merit
  - little understanding of the role of the principal by many boards
  - little awareness of the importance and value of academic qualifications by most boards in my research
  - the influence of the community and what is seen as “best fit for this school” which is based on what I term “local logics”, which has nothing to do with the specified criteria in the job description, but emerges at the interview stage.
  - gendered preferences emerging from decisions based on unstated “local logics” such as the need for a role model for boys, a disciplinarian for the boys, someone who will take team sports and outdoor education, balancing the gender ratio of the staff, etc by a large majority of boards. The interviews which overtly and flagrantly displayed this type of discrimination were in breach of the Human Rights Act and EEO principles in the State Sector Amendment Act.
  - the influence of some principal advisers on lay board members who perpetuate male dominance of the principalship. Some of the advisers I interviewed were working in the ‘old boy network’ style identified by NZSTA, and in one region they were indeed influencing boards to appoint male principals. Out of fifty city schools in this region, women were principals of only two.
The Ministry of Education statistics in 2002 state 60% of primary principals were men drawn from a pool of 18.5% of male teachers. 80% of APs and DPs were women, yet they only constitute 40% of principal positions. The gender disproportion in the principalship that continues confirms my conclusion that gender rather than merit is the over-riding criteria used in principal selection. The rate of change since 1989 has only been 1% per year.

It sets out recommendations that inadequately address the problem
The recommendations decided on by the working party will not in my opinion solve the problems involved in boards' appointment practices. They merely “fiddle around the edges” of a much more complex and wide-ranging problem. Good practice guidelines require some compliance assurance process to ensure they are applied. I include for your information the policy recommendations I have put forward in my thesis, which I believe will far better meet the Ministry’s requirement to improve the employment decisions of boards, so that the best person is more consistently appointed to the principalship.

I am happy to discuss my research findings with you if required.

Yours sincerely

Signature Redacted by Library

Keren Brooking
Senior Lecturer
Massey University College of Education

Encl: Policy recommendations from thesis, in progress
Appendix 11

Reply from the Minister of Education

Hon Trevor Mallard
Minister of Education
Minister of State Services
Minister for Sport and Recreation
Minister responsible for the Education Review Office
Co-ordinating Minister for Race Relations
Associate Minister of Finance

8 November 2004

Keren Brookings
Senior Lecturer
Massey University College of Education
Private Bag 11 222
PALMERSTON NORTH

Dear Keren

Thank you for your letter of 17 September 2004 concerning the report of the working party on Primary Principals' appointments. I appreciate your sharing your research and policy suggestions with me.

While in your thesis you have made suggestions for significant changes to how principals are employed and appointed, the working party was empowered only to identify a good practice model for boards of trustees to use in their current employment and appointment responsibilities. The objectives of the working party were established through the primary principals' collective agreement in 2003.

I am pleased to tell you that the issue of preparing principals for their role is one that is very much a part of the Ministry of Education's work.

As you may be aware the Ministry of Education and the teacher unions recently concluded collective employment agreement negotiations for teachers and principals. This has resulted in a long-term work programme to consider many matters, especially career pathways for teachers and principals and the development of specialist qualifications.

I anticipate that the work programme on career pathways will consider the core set of capabilities that equips a teacher for future roles, including leadership. Beyond this will be the specific skills that teachers may need to develop for formal leadership roles including principaship. I note that such an outcome would be consistent with the first recommendation of your thesis.

Thank you for taking the time to write to me about these important issues. I hope that the publication of your findings stimulates a useful debate.
I wish you well with completing your thesis and I hope that your research will help to inform the long-term work programme on career pathways.

Yours sincerely

Signature Redacted by Library

Trevor Mallard
MINISTER OF EDUCATION