

AN ANALYSIS OF A 'SCOTTISH DIMENSION' IN THE DEVELOPMENT OF SCHOOL-BASED MANAGEMENT

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SYNOPSIS

This article considers the introduction of 'school-based management' in Scotland. While there are various definitions of 'school-based management' (Whitty, Power and Halpin, 1998), generally it involves the devolution of selected resources and associated decision-making powers and managerial responsibilities to school level. The article begins by tracing the long-standing debate about the distinctiveness of Scottish education. However, much of this literature has focused on issues of access to education, curriculum and pedagogy, rather than on management processes and practices in particular. Therefore, in light of an international movement to school-based management, this article explores the existence and nature of a 'Scottish' dimension in devolving management to Scottish schools. Many of the findings drawn upon are based on research with headteachers (13 primary schools and 12 secondary schools) and senior education officers (located in 3 Regional authorities and 8 unitary authorities) conducted during the *processes of developing and implementing school-based management*.

A 'SCOTTISH DIMENSION' IN EDUCATION

A lot has been written about the distinctiveness of the Scottish education system and the extent to which this is influenced by, and influences, a distinctive Scottish culture and associated values (see for example: Clark and Munn, 1997; Humes and MacKenzie, 1994; Humes and Paterson, 1983; McPherson and Raab, 1988). A belief in the value of education is argued to be fundamental to Scottish culture. It is proposed that the education system is founded on democratic and egalitarian values, emphasising breadth of curriculum and openness of access. The Scottish Centre for Economic and Social Research (1989) argued:

...the most prominent characteristic of Scottish education, in its origins and in its sustaining philosophy, has been the assumption that it exists to serve the whole community... a social rather than a consumerist approach to education policy. (p.14-15, emphasis in the original).

The traditional example of the 'lad o' pairs' is used to indicate the non-elitist, non-class based nature of Scottish education. He was an intelligent, but not wealthy, boy to whom education offered opportunity and advancement, ideally to university and then a professional career. However, the education system was essentially meritocratic, as success was based on ability. Nevertheless, this was perceived generally as a 'fair system' (McPherson and Raab, 1988). These characteristics are embodied in the 'Scottish myth' relating to the distinctive and essential features of education in Scotland. Following historical and sociological interpretations, the term 'myth' is used to imply the linkage of values and beliefs with the policies and practices of education: the 'Scottish myth' is 'expressive and explanatory' (McPherson and Raab, 1988).

While principles of open access, broad curriculum, democracy and egalitarianism are popular they remain controversial. The essential nature and the distinctiveness of Scottish education are the subject of debate. There is an argument that Scottish education is neither fundamentally democratic nor egalitarian (McPherson, 1983;

Paterson, 1983). Criticism has been made of the gender dimension of the assumed 'lad o' pairs'. Recently, Her Majesty's Senior Chief Inspector of Schools, Douglas Osler, warned against nostalgic interpretations of the lad o' pairs and a 'Golden Age in Scottish education' (Osler, 1999a, p.5). Yet he emphasised also a long-standing tradition in Scotland of creating educational improvement and the pursuit of equality in and through education (Osler 1999a, 1999b). Research evidence indicates that, historically and comparatively, the Scottish system has been more democratic and egalitarian in practice than many education systems internationally (Gray, McPherson and Raffe, 1983; McPherson and Raab, 1988). Indeed, a central element in defining a Scottish dimension is in comparisons with developments elsewhere, particularly within Britain.

Humes (1983, p.151) argued that an enduring and cohesive feature of Scottish culture was the ongoing 'resistance to English cultural imperialism'. By the late nineteenth century with industrialisation, urbanisation and educational expansion, there were attempts to co-ordinate education policy in Scotland and England. This trend continued in the post-war period and intensified from the late 1970s onwards. Grant (1982) argued the failure of Scottish political devolution in 1979 resulted in a 'crisis of identity' and 'crisis of direction' for Scottish education (quoted in Robertson, 1984, p.226). The Thatcher/ Major Governments sought to construct a British 'electoral project' (Rhodes and Marsh, 1992) advocating a large 'dose of Thatcherism' for Scotland (Fisher, 1988, p.77), which was perceived as threatening 'the integrity and autonomy of Scottish education' by the late 1980s (Paterson, 1997, p.147).

However, despite movements towards 'the assimilation of Scottish and English education' (Hanham, 1965, p.206), the Scottish education system retains distinctive features in principle and practice. McPherson and Raab (1988, p.x) concluded:

...many aspects of continuity and change after 1945 have been common to both countries (Scotland and England), arising either directly or indirectly from the commerce of people and ideas. At the same time, however, Scottish educational policy has been made by its own cast of characters, in its own setting and, for the most part, with its own script as well. We find in it, therefore, both the particulars of Scottish experience, and also the themes of British experience realised in particular Scottish form.

Paterson (1997) suggested that the distinctiveness of Scottish education is not simply the legacy of historical separation, but rather the ongoing negotiation of Scottish autonomy.

It is within this context of attempts to reconcile and to retain differences within the education systems of Scotland and England that school-based management was introduced. Furthermore, the introduction of school-based management was not simply a British initiative, but part of an international trend.

AN INTERNATIONAL TREND TO 'SCHOOL-BASED MANAGEMENT'

Caldwell and Spinks (1992) suggested their 'self-managing school' model was becoming an 'international mega-trend'. Indeed, something of an international trend to developing school-based management can be discerned. However, such developments are not the uniform implementation of one model of self-management. Hence, Caldwell and Spinks have been criticised for offering an inappropriately universal model. Angus (1993, p.22) argued 'the world of *The Self-Managing School* is an unreal world', 'remote' from social and economic realities, in which different forms of school-based management can be developed promoting different means and serving different, often political, ends.

According to Caldwell and Spinks (1988) a 'self-managing school' involves the devolution of a potentially broad range of resources, including:

...knowledge (decentralisation of decisions related to curriculum, including decisions related to the goals or ends of schooling); technology (decentralisation of decisions related to the means of teaching and learning); power (decentralisation of authority to make decisions); material (decentralisation of decisions related to the use of facilities, supplies and equipment); people (decentralisation of decisions related to the allocation of people in matters related to teaching and learning); time (decentralisation of decisions related to the allocation of time); and finance (decentralisation of decisions related to the allocation of money). (Caldwell and Spinks, 1988, p.5).

Yet, as Bullock and Thomas's (1997) analysis for England and Wales revealed, schools are not completely self-managing for any of these resources, as powers have been centralised to central government, altered at local government level and decentralised to parents, as well as to schools. Although there are differences in detail, a similar movement can be identified in Scotland.

Bullock and Thomas (1997) argued furthermore that if schools were to become truly 'self-managing' with the associated rhetoric of 'school autonomy', further resources and powers would need to be devolved:

These are: (i) admissions: decentralisation of decisions over which pupils are to be admitted to the school; (ii) assessment: decentralisation of decisions over how pupils are to be assessed; (iii) information: decentralisation of decisions over the selection of data to be published about the school's performance; (iv) funding: decentralisation of decisions over the setting of fees for the admission of pupils. (Bullock and Thomas, 1997, p. 7-8).

However, the devolution of these resources and powers is beyond the scope of current school-based management in England and Wales and Scotland. Such powers would result in the creation of essentially 'privatized' self-managing schools. Rather, while some managerial powers have been devolved, strategic and evaluative powers and controls have been centralised (Fairley and Paterson, 1995).

It is beyond the scope of this article to offer a comprehensive review of the detailed nature of devolved management being implemented internationally. However, it is important to note that there has been, and continues to be, a movement towards decentralising (some) resources and decision-making within education systems. The movement to specifically school-based management has become pronounced in English-speaking advanced industrial democracies. Whitty, Power and Halpin (1998) suggested that comparisons between Australia, England and Wales, the USA and New Zealand are important given the 'shared language' (p.7), a history of policy borrowing and influence between the countries and an apparent 'convergence of politics' (p.11). Hence, despite differences in detail, there are commonalities in the impetus to, and implementation of, school-based management across these countries:

Within the range of political rationales, it is the neo-liberal alternative which dominates, as does a particular emphasis on market-type mechanisms. This decentralization via the market is also articulated with justifications of quality and efficiency, drawing on the discourse of the new public management with its emphasis on strong school management and external scrutiny... (Whitty *et al*, 1998, p.36).

Unfortunately, there is a lack of research comparing Scottish school-based management with international developments. While the combination of managerial reform and market forces has been introduced in Scotland also, research has suggested that market forces are not as pronounced as in England (see for example: Adler,

Arnott, Bailey, McAvoy, Munn and Raab, 1996; Paterson, 1997). Importantly, the nature and prevalence of market forces has been identified as a key factor in differentiating, albeit to a degree, school-based management in England and Wales and New Zealand, compared to parts of the USA and Australia. Similarly, research focusing on the changing nature of headteacher's leadership suggested that headteachers in England have been most affected by market models and New Public Management prescriptions, whereas these influences have been moderated in Australia and Scotland (Moos and Dempster, 1998).

Whitty *et al* (1998) concluded that while there is evidently a trend within the countries which they reviewed to a combination of managerial and market reforms, there are also differences in the details of these policies. Drawing on McLean (1995, p.v), they explained the need to pay attention to the distinctive education 'traditions' of nations, which are 'ultimately unique' in their detail and context.

THE DEVELOPMENT OF SCHOOL-BASED MANAGEMENT IN SCOTLAND

Experiments with forms of school-based management began within local authorities in Scotland. The most developed pilots were conducted in Dumfries and Galloway Region and Strathclyde Region. As Strathclyde Region was the largest authority in Scotland at this time, this section focuses on the development of school-based management in this Region specifically.

The beginnings of the movement to school-based management in Strathclyde can be traced to the mid-1980s. There were two key strands to reforming the management and structure of Strathclyde education: one was to make the education service more responsive to local community needs and tackle deprivation; the second was to increase the economic and managerial efficiency of the education service. There were ongoing tensions between these imperatives, with the former favouring community empowerment and democratic models and the latter promoting managerial and economic models.

While Strathclyde was explicit in its attempt to be proactive in developing its education service and at the 'vanguard of innovation' (INLOGOV, 1989, p.41), the proposed reforms were reactive also to local circumstances (falling school rolls, expenditure constraint and school rationalisation) and national policy developments (the legislation of School Boards in 1988 for Scotland, the Education Reform Act 1988 in England and Wales including Local Management of Schools and Grant-Maintained Status (GMS) and the legislation of GMS for Scotland in 1989). In retrospect, a Strathclyde education officer commented:

...it wasn't a pure model that we were developing. It was constrained by the fact that we wanted to maintain good relationships publicly with all of our potential clients. (Quoted in Campbell, 1999a, p.518).

In developing a publicly acceptable model, differentiating a Scottish Strathclyde model from the then Conservative Government policy and developments in England became important.

During 1988 a fundamental review of the 'effectiveness' and 'appropriateness' of Strathclyde Education Department's structure and resource management was undertaken by the University of Birmingham (INLOGOV, 1989). Although the review's remit was to focus specifically on the central Education Department, its advocacy of a decentralised structure has been perceived as the impetus to developing school-based management (Fairley, 1995; MacKenzie, 1994; McDowall, 1994). The INLOGOV report began by commenting that the education service was operating in a 'transformed context' (locally and nationally) to such an extent, that: 'No change was not an option' (INLOGOV, 1989, p.5-6). The central proposals were the

separation of operational and strategic management and a redefinition of the roles of the 'centre' and 'periphery'. The report considered the appropriate distribution of powers between the centre (Strathclyde Education Department), an intermediate tier (a divisional or area office) and the institutions (including schools). It concluded the need for a strengthened and enhanced role for an intermediate tier: this was deemed the most appropriate way to achieve a balance between economies of scale and local responsiveness.

The general principles of the INLOGOV Report were accepted by Strathclyde; however significant modifications were made in the 'Implementation Plan' (Pignatelli, 1989). Importantly, in practice, decentralisation to school-level was advocated as more appropriate than to an area-level. The education service already operated on the basis of a central Department and six locally based divisional offices. According to senior education officers in the Central Department, these divisional offices were intended to be more akin to a 'local branch' of the Centre rather than functionally autonomous. Furthermore, the School Boards (Scotland) Act 1988 indicated a possible move to enhanced managerial powers at school-level: hence the attempt by Strathclyde to pre-empt 'likely' developments and act 'positively to shape these developments in a way which accords with its own policies' (INLOGOV, 1989, p.53). Fundamentally, the prospect of moves to decentralise management and restructure education were such that Strathclyde's Director of Education commented:

The very existence of a socially accountable education system is now in doubt. (Pignatelli, 1989, p.1).

Thus, the attempt to 'shape' a form of school-based management which required also a strong role for the local authority. Consequently, the roles proposed for Strathclyde Region within a system of school-based management included: strategic management; line management; providing the framework for budget management; offering the benefits of central services and bulk purchasing; and providing support structure for school-based management (Pignatelli, 1989).

The principle of piloting a scheme of school-based management, to be known as Delegated Management of Resources (DMR), was approved in 1990. Six secondary schools and their feeder primaries (a total of 33 schools) piloted DMR during 1990 to 1991. Consequently, the phased extension of DMR to all Strathclyde schools by April 1994 was approved. However approval by the Strathclyde education committee for the principle of DMR and the acceptance of teachers towards the policy was not straight-forward. A key issue was a fear that the English model of Local Management of Schools (LMS) would be imposed (see Bullock and Thomas, 1997; Levacic 1995 for details of LMS). Hence education officers emphasised the 'Scottish dimension' of the proposed policy:

...we were saying to people we are going to try and take national legislation, amend it to take account of our, the Scottish dimension, and try to influence it for the good... it was described as a Trojan horse that we were selling a pass and that Local Financial Management would come to Scotland... it was a very, very difficult period when people were beginning to feel that we were beginning to betray the Scottish dimension. (Education officer, quoted in Campbell, 1999a, p.370).

One means to distance Strathclyde's policy from Conservative proposals and developments in England and Wales was the decision to reject the term Local Financial Management and replace it with Delegated Management of Resources:

...to emphasise these differences in perspective from the government's notion of local financial management. (SRC, 1989, p.3).

In documentation distributed by Strathclyde Education Department during the debate about the introduction of DMR, it was made explicit:

The aim of any scheme to be introduced in Strathclyde must be to maximise the potential benefits of decentralising control while minimising the dangers inherent in the mechanistic approach being adopted South of the Border. (SRC, 1989, p.2).

Several 'differences in perspective' from English LMS and Conservative policy were highlighted in the Strathclyde proposals. The inclusion of a large 'supportive local authority framework' (SRC, 1990, p.1) and linkages to Strathclyde's community development model were proposed to be integral. The role of education professionals in school-level decision-making, with the budget being devolved to the headteacher and the requirement to create a Staff Consultative Committee in schools, was promoted as vital. By contrast, the School Boards (containing parental members) were to be informed but not central to decision-making. The nature and construction of school budgets in Strathclyde were to differ from English LMS; for example, budgets were to be carefully constructed based on aggregates of different budget headings with various formulae depending on the nature of the area of resources; protection for staffing salaries was proposed; and flexibility was to be built in through the capacity for virement and carry-forward.

Therefore, the form of school-based management piloted in Strathclyde involved differences in policy and practice from Local Management of Schools in England and Wales. In determining and promoting these differences, the emphasis on a 'Scottish dimension' became important in the policy discourse associated with Strathclyde's DMR. Such an approach emphasises the potential for policy discourses to be constructed purposively and applied strategically in periods of educational change, particularly linking proposed reforms to 'local traditions' and the 'cultural context' (Taylor, Rizvi, Lingard and Henry, 1997, p.167).

DEVOLVED SCHOOL MANAGEMENT

During 1991, the then Scottish Office Education Department (SOED) initiated consideration of a national scheme of school-based management, to be known as Devolved School Management (DSM). Strathclyde officers believed that their DMR scheme was highly influential in this development. However, the Conservative Government, prior to Strathclyde's pilot, had begun a programme of devolving management in Britain. The SOED acknowledged the influence of both English LMS and Strathclyde's DMR, plus the experiments in Dumfries and Galloway, in developing DSM (Henderson, 1994). In this process of developing DSM, the promotion of a 'Scottish dimension' again became important.

During the initial consultation concerning DSM, some of the principles underpinning the policy were similar to those informing LMS in England and Wales. The Government argued school-based management was the logical extension of the creation of school boards and parental choice, thereby linking it with the promotion of 'devolution' and 'choice' identified by Whitty *et al* (1998). It is therefore perhaps unsurprising that the proposed economic and managerial benefits of school-based management were emphasised in the SOED documentation (SOED, 1992a, b). However, despite these common political imperatives, Arnott *et al* (1993, p.1) suggested that, in practice, 'the introduction of market forces, has been operationalised differently north and south of the border'.

There was a generally negative reaction within Scotland to the principles informing the SOED's initial proposals for DSM (Henderson, 1994). A fundamental issue was:

...concern about the possible introduction in Scotland of identical arrangements to those operating in England and Wales... which might not suit all Scottish circumstances. (SOED, 1992b, p.1).

The then Secretary of State responded by proposing that:

...the system we adopt must be that best suited to the education system in each part of Scotland. No single scheme could cover the diversity of our schools and regional differences. That is why I am asking education authorities to devise their own schemes to suit the particular schools in their areas. (SOED, 1992b, p.i).

Consequently, rather than being marginalised by school-based management, as evident in England (Levacic, 1995), local authorities in Scotland had the potential to influence this policy.

Authorities were required to devise DSM schemes for submission to the SOED by 30 September 1993. Although each authority was to devise its own scheme, there was an expectation that they would follow the broad guidelines outlined by the Secretary of State. Two budgets were *not* to be devolved. Firstly, responsibility for the capital programme expenditure and linked loan charges. Secondly, costs which were associated with individual pupils, rather than whole school costs, such as special educational needs. Of the remaining authority level education budget, it was proposed that at least 80% should be delegated. This was a reduced amount compared to previous proposals for Scotland and the policy in England and Wales. While it was for the education authority to determine precisely which budgets were devolved:

As a matter of general principle, however, the Secretary of State will expect schemes to provide for significant devolved decision-making on at least the following heads of expenditure:

costs of staff wholly or mainly employed at the school (both teaching and non-teaching);
furniture, fixtures and fittings;
property related costs; and
supplies and services. (SOED, 1993, p.6).

While there was an indication that predominantly per capita funding would be encouraged, there was no requirement for this. Budgets were to be constructed to take account of 'local, geographical and social circumstances, and the nature of school buildings' (SOED, 1993, p.4), allowing variations and Additional Educational Needs (AEN) to inform the formulae developed. The phased implementation of DSM began in 1994.

The precise nature of DSM resulted after a consultation exercise, during which there were some shifts away from a LMS model towards something more akin to Strathclyde's DMR. Nevertheless, Scottish DSM is neither the imposition of LMS nor the adoption of DMR. In the political rationale and the emphasis on managerial and economic efficiency, there were similarities between the principles for reform North and South of the border. However, the then Secretary of State made it clear that a scheme appropriate to and acceptable in Scotland was to be developed. The protracted negotiations within Strathclyde during the development of their DMR had indicated the need to develop a Scottish version of school-based management. In negotiating the details of national DSM, significant differences from LMS developed. In particular, the flexibility provided for local authorities devising their schemes of DSM and delegation to headteachers place the educational professionals in Scotland in a much stronger position compared to the shift to undermine 'producer capture' (at local authority and school levels) and assert 'consumer power' through governing bodies in England and Wales (Munn, 1992).

A 'SCOTTISH DIMENSION' TO SCHOOL-BASED MANAGEMENT

There are specific differences in detail between the policies of LMS in England and Wales and DSM in Scotland. LMS began implementation four years prior to DSM. LMS was part of the fundamental legislation of the 1988 Education Reform Act, whereas (at the time of writing) DSM remains policy guideline without legislation. Education authorities and headteachers in Scotland have greater powers and more flexibility compared to their counterparts in England and Wales. A smaller proportion of budget has been devolved with more flexible formulae in Scotland, compared to the predominantly per capita driven formula in England and Wales. It has been argued that these differences in 'tone and substance' (Arnott, Munn and Moore, 1993, p.2) have resulted in school-based management in Scotland being less associated with managerialism and market forces in practice.

The Scottish policy context has contributed to these factors also. Although devolution and choice (Whitty *et al.*, 1998) have been combined, parental choice is exercised less widely in Scotland compared to England. Research indicates that there are stronger links between secondary schools and feeder primaries in Scotland (Raab, Munn, McAvoy, Bailey, Arnott, and Adler, 1997). Evidence suggests a 'reluctance' amongst headteachers (Adler *et al.*, 1996, p.23) and school boards (Wilson, McFall and Pirrie, 1995) to compete with other schools. It has been suggested that 'competition among schools in Scotland' is 'quite frankly to most of us, a very alien concept' (education officer, quoted in Campbell, 1999a, p.499). Raab *et al.*'s (1997) research comparing schools in Scotland and England suggested that the emphasis on per capita funding in the latter encouraged more competition. Raab *et al.*'s (1997) research indicated also that school-based management in Scotland has not led to as pronounced a gap between educational and managerial powers and decisions as has been identified in England. In interviews with headteachers in Scotland, while they recognised their developing managerial powers and roles, they were generally unwilling to develop business management or entrepreneurial practices; instead a professional form of educational management was evolving (Campbell, 1999a). As Ball (1993, p.67) commented, 'professional management' is 'in many ways... the acceptable face of management... it concentrates upon the business of *education* rather than education as a *business*' (emphasis in the original). Therefore, there has been some mediation of market forces and managerialism in Scotland.

Support for state education delivered through a comprehensive system remains very strong in Scotland, with around 96% of the school-age population attending such schools. Unlike England, where school-based management has been argued to result in the erosion of the role of the education authority, there remains support for a range of roles for Scottish education authorities within a devolved management system (Campbell, 1999b). A Director of Education explained:

... we don't believe in the competitive. We feel it should be co-operative and fair, and identify need, and try to keep them all in the family... We don't believe it's a market. We believe it's a social service. And I think that's a fundamental philosophical point. (Quoted in Campbell, 1999a, p.502).

While the relationships between schools and education authorities are not unproblematic, research in Scotland indicates the development of an 'element of solidarity' (Adler *et al.*, 1996, p.39) in implementing reforms such as DSM and a concern within schools, as well as education authorities, that school-based management would result in the demise of the education authority (Campbell, 1999a; Raab *et al.*, 1997; Wilson *et al.*, 1995).

Consequently, the potential to 'opt out' of local authority control through the more thorough form of school-based management, Grant-Maintained Status (GMS) (involving the devolution of 100% of potential school-based budget), was not

popular in Scotland. As Fairley and Paterson (1995, p.18) commented, the policy was 'a spectacular flop'. Only one secondary and one primary actually opted out, both to avoid closure. While the introduction of DSM had benefited from the 'DMR precedent' (Adler *et al*, 1996, p.76) and the negotiation of what was perceived as a Scottish dimension, GMS was perceived as 'an English measure enforced on the Scottish system' (headteacher quoted in Campbell, 1999a, p.438). Although DSM was introduced in the form of policy guidance only, it was implemented throughout Scotland. By contrast, GMS was (unusually) embodied in legislation during the year after its legislation in England also. This process and policy caused consternation:

...because something is tried in England with some success, it should not be automatically transferred to Scotland. (Headteacher quoted in Campbell, 1999a, p.438).

In the research reported in this article, another headteacher spoke of 'a cultural abhorrence to the whole principle of opting out' (quoted in Campbell, 1999a, p.438). It was argued by headteachers and education officers that there remained a willingness for schools to be part of an education system and service, which included the education authority:

...in Scotland, the political culture and social culture is not for schools to opt out and go it alone. The strong, strong feeling is that we want to be partners with a good local authority. (Headteacher quoted in Campbell, 1999a, p.438).

Opting out was associated with market forces and undermining collective, public provision; consequently it was argued:

I think it (GMS) goes against the Scottish ethic... There's not so much of a tendency to chance your arm and go for broke, and get into the PR and the marketing and try to do your colleagues down... it's the fairness thing, there are communities who could fund things and supplement and there other communities who could not. And there's no way we would want to sit back and see schools becoming second class schools or sink schools. (Director of Education quoted in Campbell, 1999a, p.443).

The discourse was of public service, partnership and collectivism forming an education *system*, not the adoption of market forces and managerialism. Headteachers and education officers made reference to the enduring importance of the Scottish educational tradition, embodied in the 'Scottish myth' and epitomised by the 'lad o'pairs' (Campbell, 1999a; McPherson and Raab, 1998).

Therefore, the traditional definitions of a 'Scottish dimension' in education still held currency, particularly a belief in an egalitarian and democratic publicly provided system. McPherson (1983) explained that this popular and collective appeal to Scottish educational and cultural traditions, the 'Scottish myth', reflects Durkheim's definition of a 'myth' having:

... two simultaneous functions: to celebrate identity and values and to describe and explain the world in which these are experienced or sought. (McPherson, 1983, p.218).

More recently, research analysing discourses, particularly relating to professionals and education policy, has indicated the manner in which discourses, for example 'a discourse of Scottishness' (Campbell 1999a), are both individualised, linking with personal values, and socialised, linking with 'socio-cultural, situational and historical contexts' (Gunnarsson, Linell and Nordberg, 1997). Similarly, research analysing a 'Scottish dimension' in education policy indicates its linkage to values, beliefs and

identity at both individual and collective levels (Gray *et al* 1983; McPherson and Raab, 1988). Gray *et al* (1983, p.309) argued:

It [the Scottish myth] thereby facilitates collective action, but only within certain limits.

Such limits include the resistance to 'opting out' of the local, democratic education authority system and opposition to market forces. Therefore, the perception and practice of a 'Scottish-dimension' in school-based management served not only to influence what policy was acceptable, but also to indicate what was not: it was used to describe 'what is' and prescribe 'what ought' to be.

Recent research on the construction and use of 'tradition' in education policy has linkages to understanding the promotion of a 'Scottish dimension' in school-based management also. For example, Halpin and Moore with Edwards, George and Jones (2000) identify two key features of the use of 'tradition' in education. Firstly, a common tradition 'binds people' together giving meaning to their daily practices and context. Secondly, in times of change, 'tradition' can be 'invoked' to resist and mediate this change. Furthermore, a selective and symbolic use of 'tradition' links past experiences with future expectations. For example, in looking to the future development of the education system, a headteacher explained:

I think there are undoubtedly benefits to the historic commitment in Scotland to a very homogenous publicly owned public service ethos, in local government and education... And it is something that I personally would actively defend. (Quoted in Campbell, 1999a, p.444).

A Director of Education argued that such a perspective remained strong and influential:

There is still a belief and a faith in the state system. (Quoted in Campbell, 1999a, p.443).

However, while this was generally true, some headteachers suggested that these principles may need to be compromised if they perceived that pursuing policies such as GMS would bring pragmatic benefits to their school, primarily increased resourcing. There was a minority opinion that perhaps with the ongoing experience of educational and wider political and social reform, a cultural transformation may be beginning. Fairley and Paterson (1995) predicted that as the 'real life frustrations of partial autonomy' combined with the reorganisation of local government became apparent, GMS may become more attractive. A minority of headteachers concurred, suggesting that if GMS had remained a possibility (the New Labour Government has stopped the GMS policy), combined with educational reform and the restructuring of governance, opting out may have become more widespread. However, this was not widely welcomed by the headteachers interviewed for the present research, particularly as it was perceived as undermining the Scottish education tradition.

NEW LABOUR AND SCHOOL-BASED MANAGEMENT

The New Labour Government placed 'education, education, education' at the heart of their priorities and policies, perceiving educational improvement as a crucial element in social and economic development. Although school-based management is only one element, it is an important one. In England and Wales, the systems of Local Management of Schools (LMS) and GMS are being replaced by a new policy of 'Fair Funding' in which schools receive 100% of the potential school-based budget (akin to GMS) but remain within the local education authority system (akin to LMS) (DfEE, 1998a). It is, therefore, essentially a hybrid of LMS and GMS. According to the Government this reform was necessary to facilitate school improvement and

to encourage a new form of partnership between local authority and school (DfEE, 1998b). In Scotland, the themes of educational reform, encouragement of school improvement, pursuit of excellence, development of new forms of partnerships and reform of school-based management have been promoted also. However, the Scottish Executive propose to develop a Scottish dimension and distinctive approach also.

Speaking in 1998, Donald Dewar, then Secretary of State for Scotland, argued that 'Scottish values' should inform the nature and policies of the Scottish Parliament. Dewar (1998) proposed that the Scottish Parliament would:

...give shape and expression to the Scottish values which have served us well in the past and which will serve us well for the challenges ahead.

These values relate to those traditionally informing the Scottish education system, according to Dewar (1998):

Scots have always had a strong commitment to educational opportunity, to the virtues of work and self improvement. We are believers in democracy and community. We have a strong sense of justice... They are values that have contributed to what it is to be Scottish.

Dewar (1998) argued the above values are both profound and powerful, proposing that the 'dream of educational opportunity' has been, and continues to be, 'as powerful' for the Scots' 'journey as a people as the American dream was for the American journey'. However, it is recognised that educational opportunity has not fully been achieved and that times have changed. Hence, the promotion of modernisation and improvement in and through education. Nevertheless, rather than rejecting the traditional Scottish values, modernisation is to develop and apply these principles in the pursuit of educational improvement. Dewar's (1998) vision is of a New Scotland which 'must be a world leader *again*' (emphasis added) in education.

Dewar's statements linked with the emotive appeal of a 'Scottish dimension' popularised by the 'Scottish myth', as McPherson and Raab (1988, p.407) commented:

It [Scottish myth] is about hearts and minds. It asserts identity, celebrates values, and explains the world through them.

Their research indicated that to understand education policy, we need to consider the 'assumptive world' of policy makers, as expressed through language and policy discourses. Furthermore, it is important to consider the 'assumed audience' (Campbell 1999a) and the political construction and dissemination of policy discourses (Howarth, 1995; Fox and Miller, 1995). As Gray *et al* (1983, p.310) indicated, we need to consider carefully the symbolic purpose and outcomes of the Scottish education tradition being 'invoked' in discourse, policy and practice.

The centrality of education to a New Scotland and the Scottish Parliament has been promoted by the Scottish Executive also. The 'Improvement in Scottish Education' Bill proposed to embody policies to modernise and improve Scottish education. The Bill attempted to develop the Scottish tradition and also make a break from some of the principles and practices underpinning Conservative reforms. Fundamentally, the collective, anti-market nature of Scottish education is emphasised:

Schools are not in competition, one with another. They form a comprehensive network throughout Scotland... (SEED, 1999, s.4.15).

The place of the school in the community is emphasised. It is suggested that we have 'a collective duty' to 'realise' 'the potential in each child' (SEED, 1999, s.4.28).

The Bill suggested that 'the commitment to excellence is fundamental to Scotland's education tradition' (SEED, 1999, s.4.11) and will be enhanced by

developing and maintaining ‘a culture of continuous improvement’ (SEED, 1999, s.4.20). Although central and local governments have important roles to play in this process, it is argued:

Only schools themselves can take responsibility for their own improvement. (SEED, 1999, s.4.3).

Every school is to have devolved financial and managerial responsibilities, plus a school plan including local improvement objectives and priorities. Within this plan, resource decisions and associated outcomes are to be identified. Hence, a proposed linkage between financial and managerial decisions and educational improvement and outcomes. However, it should be noted that in practice the capacity of school-based management to create school improvement and impact on educational outcomes remains controversial and the evidence inconclusive (Campbell and Whitty, 2000).

The ‘Improvement in Scottish Education’ Bill proposed the abolition of GMS and reform of DSM. The Scottish Executive suggested the continued development of DSM accords with schools taking ‘responsibility for their own improvement’ (SEED, 1999, s.7.4). The main proposal was that DSM should involve the devolution of managerial decision-making to school-level with flexibility over resource decisions, not simply budget administration. Consequently, the Bill considered three key options:

- Increasing the percentage of school level expenditure which is to be devolved.
- Extending the range of items of expenditure which are devolved.
- Removing or relaxing restrictions placed by education authorities on virement and carry forward. (SEED, 1999, s.7.5).

Therefore, there was an intention to extend school-based management, but within the local authority education system. Indeed the capacity for education authorities to influence DSM indicates a potential range of forms of DSM persisting. Although in practice, the system and structure of Scottish education has changed considerably historically (McPherson and Raab, 1988), particularly during the post-war period, the ongoing emphasis on a publicly-provided system supported by educational professionals is such that the development of an extended form of truly ‘self-managing’ schools appears unlikely.

A ‘SCOTTISH DIMENSION’ WITHIN INTERNATIONAL EDUCATIONAL REFORM

The basic model of school-based management being applied and developed in Scotland is similar to the models being applied in other English-speaking advanced industrial democracies, notably the rest of the UK, parts of the USA and Australia, and New Zealand. School-based management in these countries involves the decentralisation of specific resources and associated managerial decision-making, alongside the centralisation of other decisions and powers such as over issues of curriculum. These are not ‘self-managing schools’ in a literal sense. Furthermore, the movement to school-based management has been associated with the stimulation of market forces, particularly through parental choice. Therefore, the shared language, the developing convergence of politics and the history of ‘policy-borrowing’ between the countries identified by Whitty *et al* (1998) could be argued to include Scotland also.

However, the Scottish education system retains distinctive features, in principle and practice, which have influenced the development of school-based management. In particular, there has been an attempt, and some success, in developing detailed differences from practices in England and Wales. Nevertheless, Raab *et al*'s (1997, p.155) comparative research of school-based management in Scotland and England

revealed 'important differences' yet also some 'striking' 'similarities'. One of the officers interviewed in connection with the research reported in the present article argued that the 'forces that are going to push' education policy in Scotland and England 'are not totally dissimilar'; for example, the political advocacy of managerial reform (Campbell, 1999a, p.482). However, she continued to argue:

... you have always got to be aware of the different cultural context. You should never forget that the Scottish education system is different. (Quoted in Campbell, 1999a, p.482).

As Arnott *et al* (1993) suggested, this different cultural context may have mediated the policy and practice of school-based management, such that the combination of managerialism and market forces was diluted and operationalised differently in Scotland.

This existence of a 'Scottish dimension' is worthy of further consideration given debates about globalisation. It has been suggested that a shift to post-modernism, or high modernity, coupled with demographic changes have affected society. Post-Fordism, the information age and technological advances have resulted in organisational transformations. And, arguably, most pervasively, there is evidence of economic shifts and restructuring. These are argued to be global forces which have impacted on the public sector in general and specifically education (Ranson and Stewart, 1994; Walsh, 1995). However, this does not necessarily mean that there has been a global homogenisation of education. Whitty *et al* (1998, p.12) commented:

While education policies have clearly been influenced by changes of global proportions, we argue that these may not be as apocalyptic as suggested by some commentators and that they have not yet entailed a substantial demise of the role of the nation state in education policy.

Yet, the situation for Scotland is perhaps more complex, as it is not technically a nation state. Research on Scottish education policy suggested:

...the idea that the United Kingdom was a unitary state with one policy process becomes untenable. (Paterson, 1997, p.141).

Taylor *et al* (1997, p.59) argued that alongside the emergence of a global system has been the rise of 'local ethnic units' with distinctive cultures and claims for political autonomy, citing Scotland as a specific example. They suggested these 'twin elements of globalisation, notably global integration and national fragmentation' (Taylor *et al*, 1997, p.59) place considerable strain on the concept and existence of nation-states.

In many respects, the creation of the Scottish Parliament could be linked to the processes and tensions identified above. The position of the Scottish 'nation' within Britain continues to be the subject of debate. Paterson (1997) suggested that the development and promotion of a 'Scottish dimension' is due to an ongoing 'negotiated autonomy'. He proposed that 'partial autonomy', whereby Scotland remains within Britain, may be preferable due to a 'rational pragmatism', as remaining within Britain may have practical benefits, for example in relation to resources (Paterson, 1997, p.1997). Dewar (1998) adopted a similar political argument to suggest that Scotland should develop a 'utilitarian nationalism', which recognises that the best method to 'advance the well-being of the Scottish people' and to suit Scottish interests is for a Scottish Parliament within the British state, rather than separate from it: 'Nationhood does not necessarily find expression in statehood'. However, as Paterson (1997) explained, there are different forms of Scottish nationalism, including 'banal nationalism' (p.141) which operates at the level of fundamental principle rather than public pronouncement, the 'official nationalism' (pp.144-145) which is commonly shared in the belief in a relatively homogenous Scottish culture

and distinctive education system, and a more intense nationalism which developed during the Thatcher/Major years in resistance to perceived attempts to anglicise Scottish policy. This more intense nationalism has been associated with the creation of a Scottish Parliament.

This ongoing negotiation of a 'Scottish dimension' is important for understanding the principles and practices informing Scottish culture, politics and education. The fundamental principles of an education system based on democratic and egalitarian values, enabling open access and a broad education, provided through a collective, publicly provided system remain enduring. However, the definition and practice of these principles has not remained static. During the post-war period, the principles of equality of opportunity and partnership have been incorporated into a renewed vision of the Scottish education system, involving local government and comprehensive education. Currently, the Scottish Executive is attempting to adapt traditional values to develop appropriate policies for a modernised education system. Osler (1999a, p.5) proposed that the enduring features of Scottish education include: valuing education, promoting excellence, combining an emphasis on tradition with the capacity for innovation, and 'an abiding and genuine concern for equality and fairness'. He argued furthermore that these values and practices remain relevant, but require development to support current Scottish educational priorities, particularly: raising standards and achievement; developing inclusive schooling linked to social inclusion; and developing teachers' professionalism (Osler 1999a, 1999b). Therefore, the precise nature of the 'Scottish dimension' has a dynamic quality in practice, 'shaping' both the past and the proposed future (Halpin *et al* 2000).

There are clearly practical and legal differences between the Scottish education system compared to international examples and importantly to England and Wales. While these are noteworthy, they are not the only aspects of a 'Scottish dimension'. Arguably most fundamentally, it is the ongoing *perception* of a 'Scottish dimension' that is most pervasive, powerful and valued by those involved in the implementation of Scottish education policy. McPherson and Raab's (1988) research revealed the importance and influence of the 'Scottish myth' to the 'Kirremuir career' of influential individuals in the Scottish education policy community. The research presented in this article indicates the continuing influence of Scottish educational and cultural values for contemporary headteachers, education officers and policy-makers in Scotland. Paterson (1997, p.145-146) proposed:

Most of the daily policy discussion in which Scottish teachers and others engage has been similar to the discussion that could be observed in other similar educational systems... But, at the same time, the educational professionals have taken for granted a Scottish frame-work... and they have shared with the policy communities the inherited myths about the distinctive character of the system, and therefore have voluntarily participated in disseminating a homogenous image of Scottish national identity.

While the accuracy of the 'inherited myths' has been questioned, they remain pervasive and powerful. They are both 'expressive and explanatory' (McPherson and Raab, 1988, p.407) providing a popular perception of what is valued in principle and what is advocated in practice.

Initially the present research was not concerned specifically about the 'Scottishness' of school-based management, but as the views of headteachers and education officers emerged, it became apparent that the 'Scottish dimension' was very important in the negotiation of the school-based management policy and its implementation. What has been referred to as a 'discourse of Scottishness' (Campbell, 1999a) pervaded the interviewees' discussions of education policy and school-based management, indicating what was deemed to be acceptable practice and what was

'alien' and 'imposed'. Such perceptions are not inherently neutral but, drawing on Foucault, relate to the configuration of power, knowledge and truth (see Ball, 1994), shaping both individual and collective identity, including the definition and promotion of past, present and future experiences (Hajer, 1989). As an analysis of international research on school leadership suggested, the findings:

...returned us persistently to the point where cultural history meet contemporary politics, and where globalisation confronts national identity. (Riley and MacBeath, 1998, p.140).

It is this combination of the historical and the contemporary, the global and the local, which offers great potential and also great challenges for the Scottish Executive when developing education policy and practice.

McLean (1995, p.v) spoke of the different educational traditions in different countries, which were 'sometimes overlapping but ultimately unique'. It is this uniqueness of Scottish education policy that has been and continues to be promoted. With a Scottish Parliament, there is a shift from 'the taken for granted... Scottish frame-work' (Paterson, 1997, p.145-146), to a concern to explore what is and could be truly Scottish education policy. Dewar (1998) argued that Scottish values are the foundation for the Scottish Parliament and should be the 'inspiration for policy', proposing:

...the Scottish Parliament is not just for Scotland, it is of Scotland.

Scottish values and the value of education have been argued to be inter-linked.

Thus, perhaps the Scottish Executive should heed Dent's (1952, p.14) advice based on a historical analyses of education policy:

...plan with the grain of the national character, and you have a reasonable assurance that things will go well; plan against it – and you've had it.

Importantly, the Scottish Executive's pledge to develop 'the world class system that our children deserve' (SEED, 1999, s.1.13) requires consideration not only of the Scottish educational tradition, but also of the contemporary values and practices appropriate to modernising and improving education within an international movement to educational restructuring. It requires recognition also that education in England and Wales cannot be simply constructed as some 'other', focusing only on differences from Scotland: the ongoing reform throughout Britain shares similarities, for example the managerial reforms of the Conservatives and the school improvement agenda of New Labour. Furthermore, there are differences within Scotland that are often marginalised in accounts of a relatively homogenous Scottish culture. Indeed, differences between local authorities within Scotland resulted in the decision to allow each authority some discretion (within a broad framework) in the precise form of DSM implemented in their locality (SOED 1992b).

Therefore, there is a need for further research into the precise and developing nature of a 'Scottish dimension', plus its selective interpretation and dynamic qualities in policy and, importantly, its impact on practice. There is a need also to interrogate the symbolic use of a 'Scottish dimension' in policy and professional discourses, as Gunnarsson *et al* (1997, p.3) suggested, in terms of the nature of its construction: 'for whom, for what needs and why have been formed the way they are'? Such an approach would develop analyses attempting to explore the linkages between macro level structural reforms and micro level practices in schools and education authorities.

Overall, it is apparent that a commonly perceived 'Scottish dimension' has been and will continue to be negotiated, developed and valued in education and for Scotland, as evident in policies such as school-based management.

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