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# Leadership: spanning the technical and institutional dimensions of organizations

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**Abstract** *This article brings together the issues of leadership and organization. We begin by discussing the concept of leadership, emphasizing the importance of the context in which leadership occurs. Because the type of leadership addressed in this paper occurs in the context of formal organizations, we revisit the concept of "loose-coupling", which reveals the rational and institutional dimensions of organization, explaining how each dimension provides a different form of determinacy on and through which leadership can act. We end by drawing on a study in which we are currently engaged to examine the forms that leadership may take in the rational and institutional dimensions of organizations.*

## Introduction

We wrote the initial draft of this article in response to an invitation to revisit the concept of "loose-coupling" in school organizations and to consider its implications for leadership. As it turns out, that request was most timely, as both leadership and the nature of school organizations are attracting widespread and intense interest.

Leadership is again attracting the attention of a wide and diverse audience. Articles on the topic are appearing in academic and professional journals in the fields of educational administration and management. Administrators and managers attend workshops, listen to consultants, and read books to enhance their leadership skills. In the educational arena, states and prestigious foundations are investing heavily in the preparation and development of administrative leaders. Corporations invest large sums in recruiting, screening, and preparing managerial leaders. The reasons for the interest in leadership are enduring as well as rooted in current conditions. Interest in leadership has endured because we have long assumed that leaders are largely responsible for the performance of organizations ranging from athletic teams to schools and multi-national corporations. A more pressing reason for the current interest in leadership in education is the difficulty that school districts in the USA are having in the recruitment and retention of qualified administrators. While the shortage of administrators is perhaps most evident in urban schools, it is not foreign to schools serving rural and even suburban communities.

Like leadership, the nature of school organizations has a long history of confounding practitioners and scholars and has emerged as an important,



contemporary issue. At least since Bidwell's (1965) original discussion of "The school as a formal organization", we have grappled with the presence of both tightly coupled, rational properties and more loosely coupled, institutional characteristics in educational organizations. Currently, reform measures emphasize the rational by promoting "market-like" conditions (Richards, 1988). These reforms set specific standards of academic performance, hold schools accountable for attaining them, and reward or sanction schools depending on whether or not they attain standards. Critics, however, question the adequacy of narrow indicators of academic performance and highly regulated instructional practice, emphasizing instead the professional expertise of teachers and the need for professional communities in schools.

The purpose of this paper is to bring together the issues of leadership and organization. Specifically, we discuss the implications of the rational and institutional characteristics of organizations for conceptualizing administrative leadership. We begin by discussing the concept of leadership, emphasizing the importance of the context in which leadership occurs. Because the type of leadership addressed in this paper occurs in the context of formal organizations, we revisit the concept of "loose-coupling", which reveals the rational and institutional dimensions of organization, explaining how each dimension provides a different form of determinacy on and through which leadership can act. We end by drawing on a study in which we are currently engaged to examine the forms that leadership may take in the rational and institutional dimensions of organizations.

## Leadership

Toward the end of a long and illustrious academic career devoted to the study of leadership, Stogdill (1974, p. 7) concluded:

There are almost as many different definitions of leadership as there are persons who have attempted to define the concept.

Nearly a quarter century later, Yukl (1998, p. 5) arrives at the same conclusion and notes:

... it is better to use the various conceptions of leadership as a source of different perspectives on a complex, multifaceted phenomenon.

So, where do we begin? Selznick (1957) explains that the conceptualization of leadership must be based in a conceptualization of organization. A key element of organizations is social structure. In fact, some might argue that social structures are organizations, for they are the regularized patterns of action and interaction (Scott, 1998) that serve as the "blueprints" (Meyer and Rowan, 1977), shaping the behaviors and relationships of organizational participants.

The structure of organizations is crucial to conceptualizing leadership because structure and leadership are related in three ways. First, structure can inhibit and even replace leadership. Organizations' members grow committed to existing patterns of action and interaction, often blunting efforts to change

arrangements with which they have grown comfortable. Structure can also substitute for leadership (Kerr and Jermier, 1978) by producing reliable patterns of activity and social relations that do not require the insistence or oversight of a leader.

Second, organizational structures can affect leadership by determining the access to resources that leaders can ply to exert influence over others. Explanations of leadership as a form of social influence have noted that leaders exchange resources for the compliance of followers. Some of the resources on which leaders rely are tied to their positions, including rewards, punishments and the authority of office (Yukl, 1998).

Third, leadership has been conceptualized as a quality of organizations, rather than the province of particular roles of offices (Ogawa and Bossert, 1995). That is, leadership is a form of social influence that occurs when any actor affects an organization's structure. This builds on Katz and Kahn's (1966, p. 302) observation that leadership is "the influential increment over and above mechanical compliance with the routine directives of the organization". Leadership, from this view, constructs, changes, interpolates and uses structure, which includes formal, bureaucratic elements and informal, cultural elements. This is the perspective on leadership that we adopt in this article. Our approach extends Ogawa and Bossert's (1995) treatment in two minor ways:

- (1) They, perhaps for rhetorical effect, pit the institutional perspective against the dominant rational perspective. We treat the two views as providing complementary approaches to conceptualizing and studying leadership.
- (2) Ogawa and Bossert (1995) take institutional theory as their beginning point.

At the encouragement of this issue's guest editors, we start by revisiting the concept of loose coupling, which stems from multiple views of organizations, including but not confined to that offered by institutional theory.

Thus, leadership and organizational structure are deeply interrelated. Structure can both facilitate and constrain leadership. Leadership works on and through structure. In the following section, we identify two types of structure in organizations that are revealed by the concept of "loose coupling", which gained widespread attention some 25 years ago and is again attracting the interest of scholars in the fields of management and educational leadership.

### **Loose coupling: origins of the concept**

The concept of loose coupling in organizations arguably can be traced to three sources: Weick (1976, p. 2) raised loose coupling as a "sensitizing device" for exploring the order that characterizes organizations in the absence of technically rational connections between organizational elements. Cohen *et al.* (1972), in an even earlier piece, offered a model of decision making in

organizational settings, which the authors characterized as “organized anarchies”, that do not provide conditions for the exercise of classic rationality, producing choices in which solutions can be decoupled from problems. Meyer and Rowan (1977) spawned the new institutionalism in organization theory by explaining that, under particular conditions, organizations develop structures not to gain technical efficiency but to gain social legitimacy. Consequently, organizations decouple structures from work activity to avoid the detection of inconsistencies between structure and work, which could result in losses of legitimacy.

Despite their different foci, as we explain and illustrate below, these authors share common conceptual ground: they agree on the nature of loose coupling, they identify a common set of antecedents, and they note that all organizations contain both tight and loose couplings. Finally, Weick, Meyer and Rowan share the view that loosely coupled organizations are not necessarily indeterminate organizations. Instead, their elements are linked according to a logic that differs from that of technical rationality but that, nonetheless, provides order and reduces uncertainty.

#### *The nature of loose coupling*

Early discussions of loose coupling in organizations conceptualize this phenomenon similarly. Loose coupling lies in the absence of linkages between organizational elements that reflect norms of technical rationality. From the rational perspective, organizations exist to attain specific goals. They adopt or develop technologies suited to goal attainment and develop administrative structures to enhance the efficiency of their core technologies. Rational, tightly coupled systems locate authority in administrative offices, enabling managers to shape and oversee the work of subordinates. Moreover, in seeking to attain goals, organizations pursue a rational course that includes generating alternative means, examining and evaluating alternatives in terms of their contribution to goal attainment, and selecting and implementing the alternative that will contribute most to goal attainment.

Weick (1976) noted that many parts of organizations are intractable to analysis through rational assumptions, observing that organizations, such as schools, often lack clear linkages between work activity and outcomes and authoritative relations between hierarchical roles. Meyer and Rowan (1977) extended this point in spawning the new institutionalism in organization theory. They observed that organizations may adopt formal structures to gain legitimacy with external stakeholders rather than to enhance the efficiency of their core technologies. When this happens, organizations decouple administrative structures in order to respond to conflicting demands from the environment and decouple administrative structure from work activity to avoid the detection of inconsistencies and, thus, the loss of legitimacy. Finally, Cohen *et al.* (1972) suggested that organizations may make choices in ways that depart from rational norms. That is, they may eschew the reasoned generation and

assessment of alternative choices, resulting in decisions that do not solve problems or attain goals.

#### *Three antecedent conditions*

These authors agree that three conditions reduce the capacity of organizations to conform to norms of rationality and, thus, contribute to the existence of loose coupling. The first is goal ambiguity. Organizations may lack agreement on the specific goals that they pursue. The second is unclear technology. Organizations may not possess a clear and reliable understanding of the cause and effect relations that constitute their core technologies. The final antecedent of loose coupling is the absence of timely feedback from the external environment. Organizations may not receive immediate and salient assessments of their products or performance. Without specific goals to anchor operations, a clear technology predictably to produce outputs and timely and reliable feedback, organizations lack the bases for rationally linking, in a purely technical sense, their key elements, including outcomes, technology and structure. While organizations vary in the degree to which they are characterized by these conditions, all organizations possess both rational and loosely coupled aspects.

#### *Two forms of structural determinacy*

It is no coincidence that Weick, Cohen *et al.* and Meyer and Rowan single out educational organizations in their discussions of loose coupling. Educational organizations are characterized by the three conditions that compromise their ability to link goals, technologies, and structure in rational, or tightly coupled, terms. Consequently, many scholars have treated educational organizations as if they are wholly loosely coupled. Similarly, production organizations and other types of private, for-profit firms have been treated as rational organizations, often being held up as paragons of a strict rationality that educational organizations should emulate. However, both characterizations ignore two conditions in all organizations: both rational and institutional dimensions exist. And, the institutional dimension, which generally has been treated as loosely coupled, actually provides a basis for coupling organizational elements and thus for providing determinacy.

#### *The presence of both rational and institutional structures*

We have noted that Weick, Cohen *et al.* and Meyer and Rowan recognized that all organizations are both tightly and loosely coupled. Educational organizations are not an exception. In addition to having loosely coupled elements, educational organizations are characterized by linkages that reflect norms of technical rationality in two ways. First and most obviously, the functions of some subsystems lend themselves to tight coupling. For instance, the transportation units of public school districts have the clear goal of safely moving students from their homes to school and back. The technology for



attaining this outcome is well understood. And, school districts develop structures – including bus routes and schedules and maintenance operations – to enhance the efficiency of transportation.

Second, educational organizations have attempted to rationalize, or tightly couple, aspects of their instructional operations. Educational organizations continue to seek ways to increase technical control over mainstream, instructional programs. The adoption of curriculum standards and accountability systems that employ results of standardized achievement tests as the indicator of school performance are current examples. While the success of these strategies remains a matter of wide debate, it appears that standards and the specter of standardized tests can serve the purpose of specifying outcomes, or goals, for teachers and site administrators (Ogawa *et al.*, 2001). This, in turn, can shape instructional practice (the core technology of schools) by emphasizing what is taught and, to some extent, how it is taught.

Private, for-profit organizations are typically noted for their rational, tightly coupled qualities. However, scholars have begun to call for the application of the institutional perspective to the study of issues previously dominated by rational models (Menzias, 1995; Powell, 1991). For-profit organizations, after all, have an institutional side, where elements are loosely coupled. This occurs in two ways. First, many aspects of firms are decoupled from work activity because their function is to manage relations with the institutional dimension of their external environments. The widely publicized involvement of tobacco companies in a variety of charity causes provides a vivid example. Research from an institutional perspective indicates that corporate giving is shaped largely by the social networks in which executives operate, leading to the tendency for corporations in a field to give to the same charities and to give more to those favored by philanthropic elite (Galaskiewicz and Wasserman, 1989).

Second, institutional forces can affect even the rationalistic elements around which corporations are formed. For example, it has been argued that the institutional environment sets the criteria against which the technical efficiency of organizations and their products is judged (Dobbin, 1995; Powell, 1991). California's recent energy crisis illustrates this point. The Government's deregulation of the energy industry shaped business practices and market dynamics, resulting in conditions that, despite corporate strategy, undermined the financial stability of energy companies and drove up costs to corporations and consumers.

#### *Institutional basis of coupling*

Early treatments equated loose coupling with the absence of rational linkages among organizational elements. But, even these early discussions recognized that the absence of technical control did not necessarily mean indeterminacy. Weick (1976) noted that, despite the fact that activities are only “modestly connected” in a rational sense, they remain “recognizable and nameable” and

therefore manageable in some other sense. He referred to “soft’ structures” and the “crude orderliness” they imposed.

Meyer and Rowan (1977) and other neo-institutionalists that followed, have conceptualized a source of order and connectedness other than that imposed by technical rationality. The new institutionalism in organization theory explains that the environment surrounding organizations is the source of institutions, or cultural rules (Menzias, 1995). Many of these institutions are expressions of myths of rationality, arising from the density of relational networks that characterize society and the diffusion of organizational practices that are deemed effective (Meyer and Rowan, 1977). Institutions that embody myths of rationality (Meyer and Rowan, 1977) determine the legitimacy of goals and the means to attaining them. Prominent examples of institutionalized myths are professions and programs. Because organizations, from this perspective, are most concerned with the general goal of survival (Rowan and Miskel, 1999; Scott, 1998), they develop structures that reflect institutions to gain legitimacy with external stakeholders, not to enhance technical efficiency of their operations (DiMaggio and Powell, 1983).

Thus, organizations that appear to be loosely coupled from a rational perspective are revealed to be tightly coupled according to a logic of institutional determinism, where connections lie within the external environment and between the environment and organizations. Weick (1976, p. 11), who is not considered a neo-institutionalist, noted that, in the absence of rational connections arising from unambiguous outcomes and clear technologies, “it is around the issues of certification and of specifying who the pupils are that tight coupling would be predicted to occur . . .”. Certification and student classification are determined in the environment largely by professions and the state (Scott, 1995). They define tight linkages between who legitimately participates with whom in what activities within what programs and even schools.

While institutional theory emphasizes the institutional environment as the source of determinacy in the structure of organizations, some authors who write from this perspective have described how structures that are adopted to mirror institutions affect two types of activity in organizations: decision making and ceremonies. Organizational structures that have been adopted in response to institutions affect decision making and action in organizations, particularly actions aimed at producing change. Ideologies, or institutions, that are embodied in structures enable organizations to act by making “it easier for people to agree on the objectives they want to pursue, on the action alternatives they see as promising, and on the outcomes they regard as probable” (Brunson, 1985, p. 29).

Institutions, despite the decoupling of structures from the technical core, may indirectly affect the work activity of organizational members. For, when individuals engage in activities surrounding institutionalized categories, practices and programs, they develop shared meaning and values, which can produce commitments not only to support the structural façade but also to

engage in informal coordination to keep technical activities running smoothly (March and Olsen, 1984).

A single example illustrates the capacity of the institutional environment to affect the internal operation of organizations. In an ongoing study, my colleagues and I (Ogawa *et al.*, 2001) document a school district's efforts to develop and implement a standards-based curriculum. The district adopted this strategy in order to improve the academic performance of its students, which historically fell below state and national norms. While the district could have engaged in other initiatives, the choice of standards was shaped, if not dictated, by the state's adoption of curriculum standards. That is, the district's choices and actions, which were aimed at change, were shaped and enabled by institutions in its external environment. In interviews, district administrators revealed that they had engaged all teachers in the process to develop local standards, not because of the expertise that teachers possess, but with the expressed rationale of gaining teacher buy-in.

*Mapping organizational elements and couplings*

Because there exist no comprehensive descriptions of the kinds of couplings that occur among elements of educational organizations, Weick (1976, p. 11) suggested that:

... a major initial research question is simply, what does a map of the couplings and elements within an educational organization look like?

In compiling such a map, organizational cartographers must attend to the two dimensions of educational organizations in which elements and couplings occur: those determined by rational design and those established by institutional compliance. Additionally, attention must be paid to tight and loose couplings in both dimensions. To visualize such an exercise, one would begin in the most general terms by working within a 2 × 2 matrix, where rational and institutional domains would cross tight and loose couplings (see Table I).

Certainly, finer distinctions would likely emerge as the mapping progressed. For instance, theorists have suggested that couplings form a continuum of tight to loose, probably requiring more than the simple dichotomy reflected in the matrix. In addition, the map may well reveal that rational and institutional forms of organizing, or coupling, are not entirely discrete but are intertwined. For example, my colleagues and I (Ogawa *et al.*, 2001) discovered that, while a district's standards-based curriculum provides specific outcomes on which teachers focus instruction and complies with a state initiative, its function is in part symbolic because the district's standards are lower than those adopted by

|                         | Tight coupling | Loose coupling |
|-------------------------|----------------|----------------|
| Rational structure      |                |                |
| Institutional structure |                |                |

**Table I.**  
Types of organizational coupling



the state. Nevertheless, the standards are a symbol around which the commitment and engagement of teachers and site administrators arguably has developed through their participation in sessions to develop and revise standards.

*Implications for conceptualizing and studying leadership*

Our understanding of organizational structure suggests that the nature of the coupling, tight and loose, within an organization has significant implications for conceptualizing and studying leadership. The call to embrace both rational and institutional forms of structural determinacy implies the need to revisit theoretical, methodological, and practical approaches to organizational leadership. Here we draw on an ongoing study of a school district's enactment of curriculum standards reform to discuss the implications of such an integrated approach.

First, theoretical implications surface when examining the relationship between leadership and structure. Organizational attention to both norms of rationality and institutional rules is manifested in policies and programs and, more importantly, neither is without its own logic. Theoretical analyses that integrate both perspectives provide for a more complete understanding of organizational leadership. When and how leaders adopt rationally constructed, strategic plans is crucial to the conceptualization of change and the influence on organizational structure. For example, in an ongoing study, we learned that district leaders adopted curriculum standards in an attempt to set clear and uniform goals and objectives for teachers and to align an otherwise fragmented curriculum in mathematics, language arts, science, and social studies (Ogawa *et al.*, 2001). The success or failure of such rationally constructed plans begins with an analysis on the process of goal setting, implementation and evaluation. However, ignoring institutional influences that support or oppose the adoption of certain rational strategies will provide for an incomplete picture of organizational development. Our study revealed that a national and state movement toward standards and accountability provided the impetus for local efforts. Also, administrators recognized the need to garner the social commitment of teachers if there would be any hope of widespread implementation. As a result, the administration organized district-wide professional development in which teachers were charged with developing grade level standards to ensure "teacher buy-in" (Ogawa *et al.*, 2001, p. 13). Administrators never referred to a need to employ teacher expertise as a rationale for their standards development strategy.

The study of rational, strategic forms of planning and action are essential, in that it necessarily recognizes that organizations structure many of their activities under norms of rationality. The implications of acknowledging a coupling and interplay of two logics for organizational activity require that rational activities evident in certain departments and in many management level plans occur within, or along side, the institutional logic described above. Recognizing the interrelationship of rational and institutional dynamics may

illumine leaders' effects, or lack thereof, on substantive organizational change. If successful leaders influence the organizational structure and value system in ways that generate renewed social commitment to more productive activities, how are these two logics enacted in the transformational process? When and how are the institutional and rational constraints redefined as opportunities, and who does the redefining? What role do leaders play in shaping the interpretations and actions of organizational stakeholders so that goals and objectives reflect the prevailing and accepted logic; and in such cases, how do the organizations in fact go about achieving espoused goals? These questions, and others, point directly at the relationship between leadership and the technical and institutional dimensions that confound leaders, but with which they must all contend.

As a result, organizational analysis requires a methodological approach that holistically examines these logics, their manifestations and their purposes. Investigation into the character of the determinant institutions themselves, as well as the conditions within which institutions impose constraints or yield opportunities for rationally constructed reforms, may provide for a more complete picture of organizational leadership, and its challenges. Researchers will have to pay attention to institutional, including historical, context of decision making, strategic planning, program development and implementation. Such inquiry will need to go beyond the identification of environmental factors to explore the linkages between symbolic and rational action within the context of organizational leadership. A focus on the association between rational and symbolic action, and the recognition that these logics are often intertwined, require methods that probe critical cases for the actions, explanations and learning of organizational stakeholders and their leaders. For this kind of approach, organizational researchers expert in the study of strategic planning, bureaucratic structures and the like will have to draw from interdisciplinary sources to explore and understand institutionalized rules that permeate rationally constructed systems. Conversely, institutionally-oriented researchers will have to heed rational, technical constraints having formidable influences on structure as well as the institutions themselves. In our case study of district standards, we drew from observations, interviews and documents for data that did more than describe the actions of teachers and administrators in the district. These data, collected now for a three-year period, included a cultural and historical perspective of this critical case. As a result, we learned that a history of low achievement of a predominantly working class and increasingly minority student population was instrumental in teachers' and administrators' explanations of the development of standards that are lower than the state's, despite state pressures to set standards and increase test scores. Additionally, a tradition of curriculum tracking, or stratification by ability levels, provided a common rationale for defining minimum, essential and accelerated standards, despite an apparent contradiction with the rhetoric of standardization. In sum, socio-cultural histories of organizations and their context inform researchers'

necessary study of rational approaches to the efficient production of material goods or services in a capitalist society.

Finally, the investigation of the relationship between the rational and institutional logic within loosely coupled organizations may reveal hidden, but no less important, influences on organizations, informing leadership preparation and development. For example, corporate interests are often linked to organizations such as schools explicitly through their influence on vocational and academic curriculum. However, a closer investigation of institutional constraints and programmatic responses to "client" needs may reveal that corporate endeavors seemingly unrelated to school activities have both normative and coercive effects on the organizational planning of schools. In such cases, the relationship between cultural rules that promote corporate expansion at the expense of community development can limit organizational outcomes in settings where the greatest need for gains are most urgent. As a result, rational approaches to achieving higher parental involvement and, in the end, higher student achievement, will have to take into account constraints beyond those of internal human, temporal and material resources. In our case of district standards development, district administration responded actively to institutional pressures to align curriculum with standardized assessment tools. Leaders restructured the curriculum, professional development opportunities, and instructional time to accommodate this reform across the system. Standards were developed from kindergarten through twelfth grade in math, language arts, science and social studies. Professional development days were exclusively spent on revising standards or developing lessons for standards. And, elementary teachers were encouraged to devote most of their instructional time to teaching math and language arts, the two subjects that are tested in state and district assessments, often eliminating science, art, and music from the instructional day. The outcomes of this curriculum reform have yielded unintended consequences. The leadership, by accounting for the persistence of differentiation across all levels, and lack of implementation in the high schools, invoked the power of other cultural rules and traditions to which they did not attend in developing standards, but were confronted with at the implementation stage. As a result, the influence of district leadership on the actual outcome, that is, student learning, remains questionable.

In the end, in fact, leadership development programs aimed at preparing agents for an improved society might include a central component that addresses leverage for and against institutions that enable or inhibit goal attainment of organizations and organizational sectors. Certain software company leaders have recognized the relationship between technical development and institutional constraints, and have intervened in an attempt to achieve company goals. Educational organizations face both technical and institutional ambiguity and constraints, emphasizing the imperative that leadership programs reflect the holistic conceptualization for which we argue in this paper. We believe our findings in the case of district standards reform

reinforces the need for leadership programs to attend to those cultural rules that are the constraints or impetus for organizational change.

This conceptualization of leadership calls for interdisciplinary approaches that link the local case to the larger context in ways that explore and define the determinant sources for organizational leadership. We call for theoretical, and methodological approaches that embrace both rational and institutional perspectives of organizations, especially as they coexist and at times intertwine within organizational reforms. Further, we argue that this type of holistic investigation should probe for the resources available to, and used by, leaders to leverage substantive change within prevailing logics. Consequently, policy makers, organizational researchers and leadership development programs must be accountable for recognizing the conditions that support or inhibit leadership, especially given that organizations often possess both rational and institutional dimensions.

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