



The current issue and full text archive of this journal is available at
<http://www.emeraldinsight.com/0957-8234.htm>

Journal of
Educational
Administration
40,6

604

Rationality and reality in organizational management

Using the coupling metaphor to understand educational (and other) organizations – a concluding comment

Brian Rowan

School of Education, University of Michigan, Ann Arbor, Michigan, USA

Keywords Management, Organizational change, Education

Abstract *In this paper, I argue that ideas about loose coupling can serve a useful purpose in organization theory, but only if they are re-worked substantially. This re-working, I argue, will involve merging ideas about loose coupling with ideas found in other lines of work developed contemporaneously, including research on the “new” managerialism, institutional theory, and organizational ecology. Such a re-working, I hope, will entail closer attention to the elements in educational systems that can be coupled and to an expanded list of coupling mechanisms. Using this expanded list of coupling mechanisms, and thinking more clearly about how educational organizations are embedded in dense and complex webs of couplings calls for a movement away from an exclusive concern with loose and tight couplings among dyadic elements in organizational systems, and toward a concern with “tangled” couplings.*

In the introduction to this special issue of the *Journal of Educational Administration*, Meyer (2002a) reflects back on 25 years of writing about educational organizations as “loosely coupled” systems and asks whether the time has come for scholars to move away from the imagery of loose coupling and to pay more attention to what he calls the “new managerialism” in organizational analysis. Other papers in the issue demonstrate why Meyer’s question is so timely. Around the world, it seems, education systems have become far more rationalized and bureaucratized than they were when ideas about loose coupling first emerged in organization theory, and this has brought administrators and policy makers in education under increasing pressures for accountability. All of this, in turn, raises important questions about the continuing relevance of models of loose coupling to the analysis of educational organizations and about the possibility that new models of organizations might be needed if we are to arrive at a better understanding of current trends in education and of fruitful strategies for improving educational organizations.

In this essay, I propose to address Meyer’s (2002a) question about theoretical developments in educational administration by arguing that ideas about loose coupling can continue to serve a useful purpose in organization theory, especially as a counterweight to naively “rational” models of organization. But I also will argue that ideas about loose coupling, as developed in the literature on educational organizations, will have to be re-evaluated and re-worked before they can adequately describe recent developments in the field of education or



Journal of Educational
Administration,
Vol. 40 No. 6, 2002, pp. 604-611.
© MCB UP Limited, 0957-8234
DOI 10.1108/09578230210446072



be used as guideposts to educational improvement. In fact, as the reader will see, I am fairly skeptical about the analytic leverage we gain from images of educational organizations as loosely coupled systems and far from convinced that the metaphor can serve as a “master” concept in future analyses of education systems. Indeed, as I have argued elsewhere (Rowan, 1995; Rowan and Miskel, 1999), I find the coupling metaphor quite limited in many respects, and think that other theoretical perspectives – developed contemporaneously with work on loose coupling – tell us as much or more about educational organizations and their improvement than do ideas about loose coupling. Still, for sake of argument, I will make some recommendations in this essay about how the use of the coupling metaphor can be improved, and how such improvements might help revitalize this concept as an analytic device in studies of educational organizations.

The contribution of the coupling metaphor

I will begin with a point made in Samier’s (2002) perceptive essay in this volume. As Weber (1947) and many others noted, the rise of the rationalized, bureaucratized, nation-state has led to a vast expansion of publicly-funded services in modern societies, not only in the field of education, but in many other spheres of public and private life as well. One result of this process, of course, has been that ideas about bureaucratic rationality – as described in the Weberian ideal – have come to function as a kind of governing logic, not only in the practice of public administration, but also in everyday affairs. To be sure, we all use the term “bureaucracy” disparagingly from time to time (especially when officials do us wrong), but as Samier (2002) notes, we also fall back almost unwittingly on bureaucratic solutions such as tightening-up hierarchies, creating more rules, or devising a rational calculus for assessing performance whenever we confront problems of organizing. Moreover, we continue to be amazed (even morally outraged) when we discover that corporate officers or other employees have deviated from the strict logic of faithful rule-following and rational stewardship that are hallmarks of the bureaucratic ethos (as reactions to the recent scandals in business accounting in the USA demonstrate). In this sense, Samier’s (2002) observations about the thorough institutionalization of the bureaucratic ethos in everyday life are especially salient. Many of us – including scholars, policy makers, administrators, and ordinary citizens – are thoroughly immersed in the bureaucratic ethos and apply it almost unthinkingly when we contemplate how to “get organized”.

But here is where the imagery of loose coupling comes in. If scholars have learned anything at all about public administration – apart from the fact that rationalization and bureaucratization are pervasive in the modern world – it is that things seldom work the way ideal models of rational bureaucracy suggest they should. In fact, we know from decades of organizational analysis that hierarchies are often tangled, that many people do not follow rules, that rational calculations of efficiency are often impossible to formulate and sometimes

counterproductive. And that is where the imagery of “loose coupling” and related natural systems thinking about organizations can perform a useful function. The coupling metaphor frees us from seeing deviations from the “ideal” model of bureaucracy as some kind of moral (or even technical) flaw, and it signals to us that other models of corporate behavior might actually be more descriptive of the real world. Indeed, that was the idea behind Weick’s (1976) original paper on educational organizations as loosely coupled systems, and it is how, I suspect, many of us who teach organization theory treat Weick’s paper – as a kind of “wake-up call” for students, one that frees them from thinking that strict rules, tight hierarchies, rigid divisions of labor and other elements of rational bureaucracies are technical (or even moral) imperatives in the life of organizations.

However, just because organizations rarely work like the Weberian model suggests does not mean we have to reject norms of rationality or the search for efficiency in the field of public administration. Instead, the ideal of impersonal and rationalized action within a bureaucratically organized context often makes a lot of sense, both from a practical standpoint, and as a normative ideal. After all, it is reasonable to ask public officials and other corporate actors to serve as impersonal corporate stewards, to economize on corporate spending and production, to make honest and informative accounts of corporate activities, and to secure at least some measure of compliance from subordinates. And that is where the body of work that Meyer (2002a) calls the “new managerialism” comes in. Freed from the assumption that rational action is necessarily pursued through the imposition of strictly bureaucratic regimes, we can think of alternative models of rational action. We might, for example, move from thinking about hierarchies as the sole model of organization in order to contemplate markets as modes of organized action, as work in the areas of welfare and organizational economics has done, and as Kreysing’s (2002) discussion of market-like “contracts” in German higher education suggests. Or, where technical knowledge is ambiguous, and the task environment is dynamic, we might organize around organic rather than mechanistic models of organization, as Meyer (2002b) suggests in this volume. Or, when it becomes clear that subordinates’ interests are only weakly aligned with corporate goals, and where direct monitoring of activity is difficult to achieve, we can devise alternative strategies like licensing or professional certification to achieve some measure of control over subordinates, as the principal-agent theories discussed by Boyd and Crowson (2002) in this volume suggest.

The point, of course, is that all of these models have been used to think about how loosely coupled systems function, but none of them appeals directly to the “coupling” metaphor. Moreover, as various authors in this volume pointed out, each of these models – which are central to what I see as the “new” managerialism in organization theory – provides considerable insight into how loosely coupled systems function and, just as importantly, how they can be improved. But none of these models was pioneered through the analysis of educational organizations. Instead, the models were imported into the field of

education from economics or, in the case of writing about mechanistic and organic models of management, from the study of industrial organizations. And that, one suspects, is part of their appeal to scholars interested in improving public administration. These are models firmly grounded in the problems of rationality and efficiency, and as a result, they are highly responsive to the reigning bureaucratic ethos of rational and efficient public administration.

Using the coupling metaphor wisely

All of this leaves me pre-disposed to want to abandon the coupling metaphor as a serious analytic tool in organization theory, relegating it instead to the role of a sensitizing concept useful in introductory courses on organization theory, but for few other purposes. I reach this conclusion, moreover, not so much because I am enamored with the “new” managerialism, but rather because I think scholars in educational administration and other fields have done little to develop the coupling metaphor as a tool for serious empirical analysis. By contrast, analysts working within other theoretical frameworks in organizational analysis (including the new managerialism, but also institutional and ecological analysis) have done much more in this regard. In these fields, there is a growing body of serious research and theory. After two decades of writing about loose coupling in educational organizations, however, I do not see similar developments. Where in the literature on loose coupling, for example, is there any sound advice about the kinds of “couplings” we ought to look at in order to explain how educational (or other) organizations function or can be improved? And, where are empirical examples designed to measure the “strength” of couplings among system elements, especially in large-scale systems where such couplings cannot be observed easily except during periods of massive disruptions to equilibrium? Instead of being characterized by a well-developed body of empirical and theoretical work, I find the literature on loose coupling to be (for most part) simplistic, especially in its development of the coupling metaphor mostly in dichotomous terms. Here, system elements are seen as coupled or not, and whole systems are seen as loosely or tightly coupled.

Thankfully, the essays in this volume stand as an exception to this general indictment. Indeed, as I discuss below, these essays explicitly acknowledge the shortcomings of the coupling metaphor, and in various ways, seek to develop some strategies for moving beyond this kind of limited thinking. But just what do we learn from these essays about this problem?

Coupled elements and coupling mechanisms

One way the essays in this volume seek to advance the coupling metaphor is to arrive at more clarity about two fundamental aspects of loose coupling theory – the elements of the system that can be coupled, and the mechanisms that can be used to produce such couplings. Two of the essays in this volume take this issue up in ways that are quite faithful to Weick’s (1976) original observations,

focusing on tasks and hierarchies as domains for the analysis of loose and tight coupling. For example, Boyd and Crowson's (2002) essay in this volume analyzes coupling across the hierarchy in educational systems, pointing along the way to some newly developing ideas about how and why elements located at different levels of the education hierarchy are and are not coupled, paying special attention to many ideas emerging from the "new managerialism" in economics and organization theory. Their essay is lively and informative, and usefully combines work on the new managerialism with ideas based in loose coupling theory. Similarly, Meyer's (2002b) essay in this volume addresses the domain of task couplings, and, like the Boyd and Crowson essay, points to some newer ideas about how and why task contingencies can be coupled or uncoupled in institutions of higher education.

More faithful to the goal of developing loose coupling theory in its own right is Ogawa and Scribner (2002) essay on leadership. Here, we see the actions of leaders introduced as a coupling mechanism, an idea, which if not entirely original, is nevertheless a useful addition to Weick's (1976) classic inventory of coupling mechanisms. Moreover, in the essay, we are treated to a variety of insights about just what leaders can do to couple system elements and produce responsive action on the part of system members. The means of coupling are described expansively here, and range from promoting reasonably straightforward bureaucratic linkages to coupling through wise use of symbols. Other essays in this volume also add to Weick's (1976) list of coupling mechanisms, especially Kreysing's (2002) fascinating discussion of "contracts" between system elements in German higher education.

All of these essays point to some straightforward ways of improving loose coupling theory, pathways that involve specifying more clearly both the elements of a given organizational system that can be coupled and the mechanisms that can be used to couple these elements. However, with respect to the first problem – specifying the elements to be coupled – the essays in this volume seem (at least to me) to be typical of a lot of writing about educational organizations. For most part, they focus on couplings among internal elements of local education authorities, or among local elements and external (state or federal) governing agencies. While a focus on couplings within educational organizations and among these organizations and their governing agencies is important in educational analysis, there are many other elements in the educational system that are also relevant to the functioning of schools and to the improvement of educational performance. Elsewhere, for example, I have discussed the relationships of teachers to their disciplinary societies and how this affects both the nature of instructional work and the prospects of improving schools (Rowan and Miskel, 1999; Rowan, in press). And, like many others, I also have discussed the coupling of K-12 schools to publishing houses and testing agencies, couplings which again have important implications, not only for understanding the work performed within schools, but also the prospects for changing the nature of that work (see Rowan, in press). The point, of course, is that future use of the coupling metaphor needs to range more

widely across system elements, encompassing couplings among elements that are internal to educational organizations, or that link educational organizations and their governing agencies, but also that attend to the host of “couplings” that might or might not link educational organizations to other organizations operating in the education industry. Only by expanding the scope of our analysis to include such broader system elements will we arrive at a full understanding of the kinds of coupling that exist – or can potentially exist – in education and to how such patterns affect our prospects for improving educational organizations.

A second point concerns the “mechanisms” that function to couple system elements. Here, too, the essays in this volume provide some critical insights by identifying a host of coupling mechanisms, including not only the authority of office and task interdependencies (two mechanisms that figured prominently in Weick’s (1976) original discussion of coupling mechanisms), but also newer coupling mechanisms, featured prominently in the new managerialism, including symbols, interests, contracts, information, resource flows, and so on. Still, while I find discussions of these coupling mechanisms exciting, I would urge a further expansion of this list to include coupling mechanisms that occur at a very “macro” level of social analysis and that involve such things as market dynamics, selective forces, and processes of institutional isomorphism that cause whole populations and communities of organizations to act in concert as a result of their shared fate. These are coupling mechanisms that have been largely ignored in discussions of loose and tight coupling, but mechanisms, which are central to institutional and ecological lines of analysis – two of the most productive lines of contemporary scholarship in the field of organizations research. Careful analysis, I believe, will reveal just how educational organizations are structured by these larger (and less visible couplings), and how such couplings figure in processes of educational improvement.

Loose couplings, tight couplings, and tangled couplings

There is another sense in which I find the literature on loose coupling less than fully developed. An emphasis on listing the elements of systems that can be coupled, and then thinking about “mechanisms” that might couple these elements, can lead to dyadic analyses of system coupling – a focus on how this element of the system is connected to that element. But in any complex societal sector, any two elements of an organized system are likely to be embedded in a host of relationships with many other system elements. To some extent, this idea was central to original formulations of loose coupling in organizational systems, and is reflected in this volume in the repeated assertion that organizational systems can be simultaneously both loosely and tightly coupled. So, for example, some actor or subsystem in an organizational field might deliberately attempt to weaken ties to one element in the system in order to tighten coupling to another element, or it might find itself subject to competing or incompatible sets of couplings, especially in richly connected and complex

systems. The positive, functional consequences of patterns of loose coupling in complex systems figured centrally in early arguments about loose coupling in educational organizations (see, for example, Weick, 1976; Meyer and Rowan, 1983), but has not been much developed subsequently. Where, for example, are the empirical observations of aggregate patterns of coupling, and what are the general principles that can help practitioners understand how to develop productive patterns of coupling in organized systems?

More to the point, the complexity of couplings in many organizations raises the possibility that we should focus less on notions of loose and tight couplings among dyadic pairs within an organized system than on the overall patterns of coupling found in that system. And this leads me to think that, in the case of twenty-first century educational organizations, the metaphor of “tangled” couplings has more salience to problems of educational organization and improvement than do notions of loose or tight coupling. Nowhere is this more clearly demonstrated than in Fusarelli’s (2002) discussion in this volume of tightly coupled policy in loosely coupled systems, where the tangled web of couplings produced by “fragmented centralization” in US education looms as a major factor in the (lack of) implementation of rationalized education policies. But in US education, one suspects that the problem of “tangled” couplings is not confined to the K-12 sector. Higher education also presents a tangled web of sometimes incompatible and conflicting couplings, with research universities standing at the center of the confusing mix -- coupled inextricably to students who demand high quality teaching, funding agencies and disciplinary societies that demand high quality basic research, business and industrial sponsors that demand practical products for economic development, alumni who demand winning athletic teams, and on and on. How institutions of higher education function in the face of these tangled couplings is the question of the day in higher education, and how these couplings are managed, both at particular institutions and in the wider community of higher education institutions, is an important problem.

Conclusion

What then is my answer to Meyer’s (2002a) question about directions for future scholarship on educational organizations? Is there a place for the loose coupling metaphor in organizational research on schools and colleges, or should we turn instead to alternative models – particularly models embedded in the “new” managerialism? Despite my relatively harsh assessment of loose coupling theory, I am convinced that there is a continuing role for the coupling metaphor in analyses of educational organizations, certainly as an antidote to naïve use of the bureaucratic model as an organizational imperative in education, but also with some new developments, perhaps also in helping us think more fruitfully about how educational organizations function and can be improved. As it stands now, however, I would have to say that other theoretical models have the upper hand, both in terms of their productive role in guiding empirical research in the field, and as a source of appealing ideas about how to improve

educational organizations. I draw that conclusion based on my own predisposition as a scholar, but also from a careful reading of the thoughtful essays in this volume. For if those essays taught me anything, it was that use of the coupling metaphor gains leverage only when it is supplemented by ideas developed in other lines of work. That is a useful lesson indeed, and one I suspect we all can chew on productively until we have the privilege of reading another volume of essays like the one presented here.

References

- Boyd, W.L. and Crowson, R.L. (2002), "The quest for a new hierarchy in education: from loose coupling back to tight?", *Journal of Educational Administration*, Vol. 40 No. 6, pp. 521-33.
- Fusarelli, L.D. (2002), "Tightly coupled policy in loosely coupled systems: institutional capacity and organizational change", *Journal of Educational Administration*, Vol. 40 No. 6, pp. 561-75.
- Kreysing, M. (2002), "Autonomy, accountability, and organizational complexity in higher education: the Goettingen model of university reform", *Journal of Educational Administration*, Vol. 40 No. 6, pp. 552-60.
- Meyer, H.D. (2002a), "From 'loose coupling' to 'tight management'? Making sense of the changing landscape in management and organization theory", *Journal of Educational Administration*, Vol. 40 No. 6, pp. 515-20.
- Meyer, H.D. (2002b), "The new managerialism in (higher) education: between corporatization and organizational learning", *Journal of Educational Administration*, Vol. 40 No. 6, pp. 534-51.
- Meyer, J.W. and Rowan, B. (1983), "The structure of educational organizations", in Meyer, J.W. and Scott, W.R. (Eds), *Organizational Environments: Ritual and Rationality*, Sage, Beverly Hills, CA.
- Ogawa, R.T. and Scribner, S.P. (2002), "Leadership: spanning the technical and institutional dimensions of organizations", *Journal of Educational Administration*, Vol. 40 No. 6, pp. 576-88.
- Rowan, B. (1995), "The organizational design of schools", in Bacharach, S.B. et al. (Eds), *Images of Schools: Structures and Roles in Organizational Behavior*, Corwin Press, Thousand Oaks, CA.
- Rowan, B. (in press), "The ecology of school improvement: notes on the school improvement industry in the United States", *Journal of Educational Change*.
- Rowan, B. and Miskel, C.G. (1999), "Institutional theory and study of educational organizations", in Murphy, J. and Seashore Louis, K. (Eds), *The Handbook of Educational Administration*, 2nd ed., Jossey Bass, San Francisco, CA.
- Samier, E. (2002), "Managerial rationalisation and the ethical disenchantment of education: a Weberian perspective on moral theory in modern educational organizations", *Journal of Educational Administration*, Vol. 40 No. 6, pp. 589-603.
- Weber, M. (1947), in Henderson, A.H. and Parsons, T. (trans.) (Eds), *The Theory of Social and Economic Organization*, Free Press, Glencoe, IL.
- Weick, K.E. (1976), "Educational organizations as loosely coupled systems", *Administrative Science Quarterly*, Vol. 21, March, pp. 1-19.